Talking Through the Numbers – Episode 14

Data-Informed Strategic Planning: Why it Works and Lessons for Success

Through interviews with researchers, community leaders, and service providers, Wilder Research examines pressing issues facing our communities today to offer insight beyond the numbers.

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Transcript

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Heather Britt: Hi, everybody. Welcome to Talking Through the Numbers. This is a podcast produced by Wilder Research. Our goal is to provide some insight on significant issues, combining some sound information with some expert knowledge to enrich our understanding of things that are affecting our communities, things that are affecting our world. I'm Heather Britt. I'm the new executive director of Wilder Research. I'm really excited to be stepping into this role as the facilitator for a podcast and to be part of these really interesting conversations with our researchers and with our partners.

In this episode, we're going to be talking about data informed strategic planning. We've got three experts participating in the conversation today: Kent Pekel, Anna Granias, and Amanda Peterson. So first of all, guests, could each of you take a little bit of time and introduce yourselves? Tell us about who you are and what you do. And Kent, we're going to go ahead and start with you.

Kent Pekel: That's great. Thanks for having me. I am currently the superintendent of schools in Rochester, Minnesota. We're a city of about 130,000 in Southern Minnesota, and home of a little hospital called the Mayo Clinic, which is generally considered the best hospital in the country, if not the world. And I mention that only because one of the things that was so appealing to me about coming to Rochester a year ago is that we are one of the world's great, as they say, destination medical centers, but we're also an urban area of wonderful and rapidly increasing diversity in many forms. And while I started my career as a high school teacher, I've spent the last 15 plus years in the world of applied research, first at the University of Minnesota, and then as president of a nonprofit research organization called Search Institute. And in both of those jobs, I worked frequently with Wilder Research, which is one reason why I reached out to Wilder Research to do the strategic plan we're going to talk about today.

Heather Britt:	Great. Thanks, Kent. Amanda.
Amanda Peterson:	Thanks for having me on today, Heather, with my colleagues. I'm excited to talk about this topic. I'm Amanda Peterson. I've been with Wilder Research for the past 10 years, and I've participated in numerous data informed strategic planning projects, and I'm really excited to share ore about what we've learned and what we've been doing. Thank you.
Heather Britt:	Great. Thanks, Amanda. Anna.
Anna Granias:	All right. Hi, everybody. My name is Anna Granias. I am a research scientist at Wilder Research. And I work on a variety of research and evaluation projects. I really at this point consider myself more of a methodologist, although I have a background in public health. I've been doing this work for about eight years, and more and more, I'm really caring about clients using the data and information that we so thoughtfully gather and invest in for them. It can be harder to do than you would think to actually use the data to make decisions. And I've found myself more and more doing strategic planning work because more and more people are interested in really having a deep and informed process with a lot of community input and engagement. So I recently worked with Kent on Rochester Public Schools strategic planning process. And it involved an incredibly high level of engagement and input from stakeholders across the entire community. So yeah, I'm really excited to dig into this topic today. Thanks so much.
Heather Britt:	Great, great. We're going to talk a little bit about kind of the facts, sort of what data informed strategic planning is. We're going to talk a little bit about kind of the implications. What are the things you have to consider? What are the lessons that we're learning along the way? We'll talk a little bit about kind of how it's being put into action. This is a place where Kent will be able to hear a little bit more about: What is Rochester doing now that it's gone through this process, kind of what's next? And then we'll talk a little bit about sort of resources at the end, and places that folks can go in case they want to learn more, understand more. So I'm going to start, Amanda and Anna, with you two and just ask: What do we mean when we say data informed strategic planning? What is it?
Amanda Peterson:	So the way I like to think about, first of all, there's a lot of different terms out there for data informed, data driven, data based decision making and planning. So we really at Wilder Research have come to embrace the term data informed decision making because while the data is very important and it's a key cornerstone of what you do, it's really acknowledging that the people are the ones behind it that are making the decisions. They are informed by the data. The data isn't doing it all. It's the people that are doing it. And strategic planning is putting together a plan for your organization and re-envisioning and coming up with strategies, and you're reevaluating your purpose and really just guiding your organization of where you want to go for the next however many years. We've worked with clients that have done three year strategic plans, five years, some of them longer than that. But typically, we focus on the three to five. So that's what I would say is the definition of a data informed strategic planning process.

Heather Britt: So talk a little bit about how it's different from kind of a regular strategic planning process or a more traditional strategic planning process.

Anna Granias: I'll answer this one, although I'm going to steal from the way I hear Amanda talk about it quite a bit. But I think it more traditionally was done with a few leaders in a room, kind of using their own expertise, perspective, and knowledge about what's best to lead the organization. And really, there's more of a call for transparency, including more perspectives. It's just no longer really appropriate in a lot of instances to do it in a vacuum. Or like Amanda says, it's no longer the C-suite kind of closed door decision making process. And I think organizations are really seeing it as an opportunity to gather information based on a lot of perspectives, have staff, people who are affected by the decisions, involved in the planning and decision making, so that everyone feels some ownership, so that the work can actually be done, and so that people feel good about it too, like, "Oh, I played a part in this, and it's going to have a big impact on my work or the people I provide services to."

So it's really just a broader way of looking at strategic planning that I think of as more holistic. And the idea behind it is that you really come out with better, more robust and impactful plans than maybe you did in the past, so that's what I would add to that.

Heather Britt: Great. What kind of of organizations are you seeing engaged in this kind of approach? And what kind of data are you sort of gathering, thinking about, stewing on, chewing on, as you're going through this approach?

Amanda Peterson: Well, a lot of different types of organizations are starting to use this. We have done strategic planning for public libraries, school systems – obviously Kent's here, that's why – community action agencies and partnerships, other nonprofits. The list goes on and on, and I really think that this type of strategic planning will become more and more used and relevant just for exactly the reasons that Anna talked about as you get a more robust strategic plan that people are buying into, which I think is very beneficial to any organization. Types of data, and Anna, feel free to jump in here, we've seen types of data from across the board, like more formal data collection pieces that we typically work with at Wilder Research, like surveys and focus groups and interviews. We've also seen more administrative data, if folks have any demographic information of their program participants, meeting minutes.

It doesn't have to be super formal either, meeting minutes. I've also heard of folks wanting to incorporate arts based methods, where they've hired graphic artists to paint literal pictures of what they're doing. It's been a variety of ways, and in those ways, ways that are meaningful to the organization. Do you have anything to add to that, Anna? I'm sure I missed something there.

Anna Granias: I would just add that there are so many different ways to do this work, and that there's really no cookie cutter process that we offer at Wilder, or that I think should be offered. Every organization has different needs and different perspectives they're trying to include, and I think that's where we come in, in a nice way, because we are a research

based organization and have all these methods and different ways of engaging different groups to inform a process or provide information. And so yeah, a variety, it can look like so many different things. Amanda mentioned arts based methods.

And a nice thing we did with Rochester at the end was, we had these different work groups that were putting in so much energy into this planning. And at the very end, we worked with a graphic recording artist to kind of record a final wrap up session, where people who were engaged in the process were able to talk about kind of the final product and what it would really mean for their community, if it is to be implemented and rolled out the way it's intended to. And then we had this great visual that maybe isn't good enough standalone for strategic plan, but it's a really nice complement to the words on a page to see these images and standout words that kind of represent the work as a whole.

Kent Pekel: And I'm happy to tell you it hangs outside our school board room right now.

Anna Granias: Love it.

Kent Pekel: Yeah. It's very cool. It was actually on the wall of the boardroom for a long time, and then I was like, "Okay, it's been there a few months," so now it has a very nice place on the wall right outside the boardroom.

Heather Britt: That's awesome. Kent, talk a little bit about sort of what drew you to this way of engaging and strategic planning, and sort of what you were hoping for when you started to engage us and kind of what that journey felt like for you along the way.

Kent Pekel: The really very nuts and bolts story behind it was I shortly, about a year ago, arrived in Rochester as superintendent, and I was meeting with community leaders. And Rochester Public Libraries had just won a national award as one of the preeminent library systems in the country. And I said to Audrey Betcher, the retiring president, "How the heck did you do that?" And she literally, first thing she said was, "Well, we did a really powerful strategic plan." And I said, "Wow, that's great. I have to do that. Who'd you do it with?" And she said, "Well, there's this organization called Wilder Research." And of course, I'd worked with Wilder multiple times in the past, and I sort of felt like the past is prologue kind of a thing.

The reason I wanted to work with Wilder, and the reason that we spent I think reasonable but significant district resources to do it, and I think in some ways if I had to kind of suggest a thesis for this podcast, most strategic plans sit on the shelf. And if you say that in a meeting, everyone will nod. We all know that's the reality. We all know we need to avoid the reality. But in fact, how do you actually avoid that reality? And of course, part of it is leadership, and it's incumbent upon me now to actually implement the darn thing. But I think a key part of it is: What really is the value proposition of strategic planning? What's the core thing? And I think in the plan that we developed with Wilder, and this is by the way not a commercial for Wilder Research, I'm receiving no numeration for singing these people's praises.

One, we really did, through the process Wilder facilitated, reach a far more diverse span of our constituency in Rochester than we could have ourselves, because frankly, we all have day jobs that are not strategic planning. So we had, both in terms of six working groups, but also surveys, focus groups that is number one. Number two was the reality of the research and data capacity that Wilder has. One of the things that's in our strategy plan is adding a research and evaluation capacity. When I got here and when we started this strategic planning process, we had no research director. We had no research office. And so if we hadn't partnered with Wilder, I would've had to do it, and I don't have all the capacity that Wilder brought. So the second is the data piece.

And I think the third actually is the independent nature of Wilder Research. They could go in and do the focus groups, including with some communities, for instance, some in communities of color, where there's a lot of mixed feelings about the school district. Nobody doesn't want their school district to succeed, but there's a lot of history. And sometimes it was about Rochester Public Schools, sometimes it was about American education in general. The Wilder team could go in and facilitate those focus groups and those working groups, and they weren't sitting there as Rochester Public Schools. They were sitting there as a partner that was unabashedly supportive of our mission, but independent. So I think those are some of the things that made it a really powerful partnership.

Heather Britt: Great. So Anna and Amanda, if someone's thinking about wanting to walk into this approach, what are the things they should be aware of? What are the things they should consider as they're sort of preparing for this way of doing strategic planning? Talk to us a little bit about that.

Amanda Peterson: I think the first thing to consider is the time it takes and the capacity of your people that are working at the organization to do it. It isn't a quick process. It is not a simple process. We ask people to really think and dig deep, and look at data during our sessions and really ask about what they want while acknowledging that they're not going to get every single thing on their wish list that they want, even if the data says they really need it. And prioritization is hard, and it can be a bit of a lift and a taxing process. But in the end, so worth it. So just thinking about that for consideration, and also you don't have to be a data nerd like the rest of us to do data informed strategic planning.

When I say it's a heavy lift, I talk about the process. But having your data available in a digestible way is also something to consider and think about as you're getting into this because you don't have to be, like I said, a statistician to dive into this process, but it is very important to consider along the way the time it takes, and that the investment you are making in it, so to speak.

Anna Granias: I agree with Amanda, just assessing your capacity. I mean, there's a process for everyone. So even if you're like, "We've got no capacity. We've got no dollars," there's something you can probably do, and we just need to figure out what is worthwhile or what we're able to do. I think the other thing to consider in terms of leadership going into this process is just really beforehand identifying what you're willing to put in the hands of

others, and how much you are willing to respond to the data. So it's a really tough situation if you're gathering a lot of information, but you're not willing to respond to that and be willing to make changes that are based on what you're hearing. So you can have varying degrees of engagement. We're kind of talking about the super engaged process in this podcast here.

But you kind of want to assess what you're willing and able to do or give up, how much power you're willing to distribute in this process because it can vary quite a bit, depending on what process you use, what methods you use for collecting data, and again, what you're asking of your staff or community members because you want to walk that line of not requiring too much of a time commitment, but also having it be meaningful engagement. So that's something we can help think through, but certainly an important part before going full on into a process, you want to make sure it's the right one for your organization and your leadership there.

Heather Britt: Kent, you started this process when you were interim superintendent. You're now sort of fully in the seat for Rochester. What were you hoping for as you kind of look back at sort of where you were at the beginning? And what are you experiencing now as an output of this process? And kind of what's next for Rochester Public Schools? Take us through that journey.

Kent Pekel: Yeah. It's a longer story and one that I wasn't here for. But my two predecessors in Rochester have had superintendentcies that have ended in complex ways, and so the school board really wanted to frankly kick the tires on a superintendent before they invested, so they wanted an interim superintendent. My youngest daughter had graduated from high school up there. I'd been president of Search Institute for 10 years. It was a good moment for personal transition. So I came in enthused about it, but not knowing if I'd be here more than a year. And that's a pretty odd time to do a strategic plan. But we did it for two reasons, not equally important. The first being Rochester was really ready. The district, the community was really ready for a set of clear priorities, and frankly was insisting upon it.

The second reason is it was the height of the pandemic, and it would've been a terrible year to have launched, for instance, major new curricular change, major new school design efforts, major new teacher professional development because people were just trying to get through in the midst of masks and many other things. But it was a great year to do reflective analysis, dialogue, and planning. So I think we used this year incredibly effectively. The design of the plan I think proceeded pretty much like it would've had I not been interim, with one major exception. The plan sets out a set of very clear changes in direction, like we're going to invest in what we call deeper learning rather than covering lots of content that a kid can recall on a test. The plan calls us to create multiple tiers of support for struggling students. The plan calls for major new investments in students' readiness for post-secondary education and a career. The plan calls for major expansion of mental health for kids.

What it doesn't include is detailed action plans for each of those things. And sometimes good strategic plans do include that. Ours didn't because frankly, I didn't know if I'd be around to guide and direct that process. And so while I felt confident in developing core priorities that the school board could vote for, I didn't feel confident in developing the roadmap. So I'm pleased that the school board in June of 2022 did vote enthusiastically seven to zero for the plan. And now we are actually in the process of kicking off the detailed development of action plans to meet all of those change initiatives. We've already radically redesigned our school improvement process based on the conclusions of the strategic planning process. And now we're moving into what we call system change initiatives, so we're getting there.

But we didn't undertake that initially, and not that we sort of had this as a brilliant foresighted method, but I actually think that's a good way to do it, because we got consensus on the big change initiatives, and now we're turning to the details. So we didn't kind of put the cart before the horse, or whatever the metaphor goes. We got consensus on the direction and now we're moving into implementation. And I think that was a good way to do it, actually.

Heather Britt: Great. Thanks, Kent.

Kent Pekel: Yeah.

Heather Britt: Anna and Amanda, talk a little bit about where you've seen organizations get stuck using this approach. What's sort of hard about it? What might be challenging for organizations and communities as they're making their way?

Anna Granias: I'll just say something, and it's really based, Amanda and I are working on another strategic planning project right now. And I feel like, I think this was very true in Rochester as well, there's almost inevitably always a pinch between this, we're asking organizations to do this really visioning and brainstorming like the world is your oyster. What are the big things you want to do? What are the most important things? And we are kind of asking them to think at that level. But then the context or the reality is often that there are limited resources. And a lot of times, we're working with service providers that are in a struggling financial situation. And so we just had a strategic planning meeting, and prior to the meeting, Amanda and I got there a little bit early. We were just listening, and it was coming off the tails of this kind of bleak financial picture. And then we were launching into all these things that they see need to be done and want to be done, and that they feel energy around and like, "Oh, but this all takes money. How are we going to do it?"

So what we often do is, or what I try to do is kind of validate that emotion as part of the process. It's kind of inevitable to feel that pinch. And then comfort folks by saying, "We are here as facilitators to really help you prioritize and create something that is going to break it into these bite sized pieces, or understand, help you come to an understanding of what is manageable within the three year time period you're looking at, knowing you literally can't do it all." And so I think that is one of the sticking points. I also think

sometimes just having enough time with the data that is collected to really sit with it, digest it, engage with your colleagues around it and others, and then turn that into planning or action. Sometimes if it's a school year or some other time constraint, it can kind of truncate things. And people always feel a little rushed in strategic planning, I think. That's also part of the process. You kind of have to push people to make some of those prioritization decisions, and that can be a little uncomfortable, but is expected.

Heather Britt: Yeah, yeah. Amanda, other things you want to sort of layer in there?

Amanda Peterson: Sure. I think that Anna hit a lot of that on the head as far as the push and pull between change and there's always tensions between folks who think, "Well, this is the way we've always done it, and we really need to just put our head down and keep going," and they get stuck in the do cycle, they keep doing, and pulling folks out of their day to day and just bringing them up to the top, the 10,000 foot level, and saying, "But if we did it a different way, this process might change, and it might make your job and your life a little bit easier." So I think that sometimes folks have a hard time of letting go of that. And it can be a tensions process of folks that are newer in the organization who want to be agents of change, and folks who maybe aren't quite ready yet. And there's kind of that tension between buy in can happen sometimes too. And I think working through that and having those conversations, even when things get a little bit off topic.

We've had sessions where folks have talked about given ... Just an example, they've given, well, this piece of news wasn't communicated correctly to some other folks in the organization. And listening to that and really pulling out, "Okay, so where's the roadblock here for you all? Does there need to be a mechanism? Does this need to be a person that's part of your plan that's going to help make sure that everybody knows this critical piece of information to the organization?" So even if you feel yourself getting off topic, and sometimes that's hard for us facilitators as well because we have an agenda and we want to get things done, but realizing and as folks are talking, picking out those key things that are an important piece, or are an important bucket to include. So those are just some of the things that we've experienced as facilitators in these processes.

Heather Britt: Thanks. Kent, I've heard you talk a little bit before about kind of how this process yielded for you all a couple of things. I've got notes on sort of clarity and precision about sort of where you want to go, maybe not that full action plan, and then kind of alignment across organizations and across communities. Can you talk a little bit more about how this process sort of enabled both of those kind of outcomes and experiences for you, for public schools, and just broader for the Rochester community?

Kent Pekel: Yeah. I think I've spent my whole career either working in or working with K12 schools in various settings. And I will just say for some reasons that kind of puzzle me, a challenge in my field, including myself, is deciding what's really important and then not piling everything onto it because we do know that actually student achievement and student wellbeing are mind-blowingly complex and the composite of many different factors. And so if you get a bunch of educators in a room, and they're doing let's just say a strategic plan or a school improvement plan, almost invariably there will be a wide array of

proposals for how we're going to work on third grade reading, or student social emotional competence, or high school graduation, whatever it might be. And that's good, there's always in any change process, there's some variant of a brainstorming phase.

Far too often in my field, though, we resolve that by basically clustering like things together and calling it an initiative. And so you'll see stuff like strengthen students' social emotional wellbeing, mental health, and resilience in the face of challenge. And they call that one initiative. In effect, social is different from emotional, is different from mental health, is different from sort of resilience in the face of trauma. They're linked. But if you're trying to actually plan with finite resources for real change, you can't combine those things. And I think in part, the Wilder folks, many of whom are really steeped in ... Anna was talking about not being a methodologist in the methodology of writing good survey questions, but really just doing good research studies more broadly … whereas for K12 educators, like I've been in for a lot of my career, that sort of mush it all together is very comfortable.

For a researcher, it's like ripping your skin off because they're like, "Oh, my God. There's six constructs in that and we can't actually measure those things. They're not distinct." Whereas again, I'm oversimplifying here, but you can get in other rooms I've been in, and we get all of the post it notes in one sticky cluster and we think we've really achieved something because we've clustered these generally similar things together. Okay. What Wilder really didn't do was allow our six working groups to stay there. And so we do have these big buckets in the strategic plan, but we actually partly because of the facilitation, got to where there is a quite clear change initiative in almost every one of them. And a couple of them where they're fuzzy, it's fuzzy by design because we needed to do more work, but it still put out a quest for change. So we need to think about how to really ...

An example of that is it clearly says Rochester Public Schools needs to be the provider of choice for families in Rochester. We don't go all the way in the strategic plan to come up with the clear ways we fully appeal to our rapidly changing demographics. But we called out the need to begin to think much more intentionally and creatively about essentially our market share in Rochester, so that's an example of a strategic plan where we maybe didn't get quite to the sort of crystal nugget we have in most of the initiatives, but I think that still is sufficiently clear to set us up for the next phase of the work.

Heather Britt: Circle back for us on the sort of alignment across organizations and communities. So part of this process is really data rich, involved lots of conversations. You needed to get to a place where a lot of different groups of humans were a little more aligned in what they were looking for, what they were seeking, where they wanted to go as a broader community intersecting with and supporting the Rochester Public Schools. Talk about how this process helped with that alignment, with that buy in, with bringing folks together.

Kent Pekel: I think it helped in two ways. One, the six working groups that we had, and they dealt with things like, there was one focused on outcomes and measurement, and one focused on sort of improvement systems, and one focused on the money and the

revenue streams, so they all had kind of a pretty clear charge. We worked very hard to have those groups themselves be diverse. And so these are people who really committed. I mean, they went to multiple meetings. And then the next tiers of feedback that we also worked with Wilder to put together, they also were quite inclusive of the very diverse community we were in, and that was focus groups, surveys, and other opportunities for input. So part of it was the collection of the information we got I think helped us bridge those divides.

We also had one of those six committees whose charge was essentially this: They were not charged with creating content in the plan like I just mentioned. They were called the coherence committee. And their full charge was to look across the plan and try and make sure that the initiatives weren't in conflict with each other for sure, but ideally that they complemented each other, and that they were reflective of the full diversity and aspirations of our community. And they didn't have any other work to do. So at first, it was kind of a head scratcher for them because they were like, "What are we doing? Because the other groups are coming up with new ways to do professional development for teachers, or new ways to allocate money to schools. And we're kind of sitting here." But as the other groups began to generate recommendations, the coherence committee really productively contributed to the plan by continually saying, "How does the whole thing fit together? And how does the whole thing really represent Rochester?"

And so if you read the full, I forget exactly where Amanda and Anna we ended up, but it's either 60 or 80 pages, depending on if you count appendixes, we're now continually working to distill, distill, distill, to its essence. And one of the challenges is as we try and get it shorter and clearer, not let anything that was really important to any of our constituencies that helped design the plan fall off. It's kind of that quintessential quote there that's sometimes attributed to Einstein, make something as simple as possible, but not one bit simpler. And so was at a community forum last week and I was talking about the plan. And there's a plan that talks about significantly expanding our extracurricular and out of school time activities starting at the middle school level. But the one page summary that I was talking from didn't call out that that has as its core focus, kids from marginalized communities, specifically kids of color.

And so somebody raised their hand and said, "I love this, but I really think that initiative ought to call out kids from marginalized communities and kids of color." And I said, "It does in the plan, but not on the one pager," because you're trying to only have so many words on the one pager. So I assured her that it did, and made a note to somehow add some words that doesn't take 80 pages to read that lets people remember that's at the core of what came out of our process in that initiative. Sorry for the long answer there.

Heather Britt: No, I loved it. It was fantastic. Last question for you all. So the data informed strategic planning process generates a lot of data and information. A lot of that is infused into the strategic plan that's developed, but that data also just becomes sort of a rich asset that organizations can rely upon kind of in the future. So Kent, talk a little bit about kind of your next phase and how you're leveraging the data from the first phase as you're walking into that kind of deeper implementation planning work. And then I'll kind of have

the corollary question for you, Anna and Amanda. Just how have other organizations kind of leveraged all of the data that they're generating through this process? So Kent, where are you at in sort of leveraging all of that great information that was generated?

Kent Pekel: I gave a long answer to the last question, so I'll try and be brief here. One, the data that Wilder helped us identify and collect has deeply informed the development of the new district wide dashboard. That is a set of indicators that we'll be using to measure the long-term impact of the plan. Our school board actually reviewed a version of that dashboard this week, and then they will approve a final version of it in November, so that's one way.

A second way is that we are still using those data sets to shape the decision making that we need to make about an array of initiatives. In our plan, it calls for having asking the citizens of Rochester to invest resources in our work in a new levee referendum, so raising their taxes or maintaining their taxes to support their schools. A lot of times when you start that process, you have to go out and collect a bunch of new data to figure out how your community feels about your school district. We are not having to do that because we have very rich data from our strategic planning process, which was just months ago, about how people feel about Rochester Public Schools. And so we are able to build on that analysis rather than replicate it.

Heather Britt: Great. Thanks, Kent. Anna, Amanda.

Anna Granias: Yeah. I can speak for the CAP agencies. I mean, and more generally, I think that oftentimes, the libraries we've worked with too will collect, do some survey of community members. And they may decide to make it available on their website, or available to other partners that may be interested in the data that they've gathered through this process. But for CAP agencies, community action partnership, they are I think required federally to do a community needs assessment every three years. I think it's three, not five, pretty sure. And so it's something they're required to do, and then I don't know if they're required to do the strategic planning or not, but they end up doing it simultaneously.

So it informs the strategic planning process, but I think it has a lot greater uses than that, like really looking at their programs and services, and reallocating resources, understanding what the community needs are, and kind of adjusting their programming and services that way, and also potentially communicating to funders. So it's not just for strategic planning when you do a really in depth process, you can use that data in a lot of different ways. It could be as simple as adding one question to a survey you have that informs some other important work you're doing and can really easily be rolled into the process, so a lot of benefits of having that data beyond strategic planning.

Heather Britt: Great. Amanda, I'm going to ask you to kind of close us out. Talk a little bit about just resources. So as folks are thinking about sort of data informed strategic planning, anything else you'd love to add there? We'll certainly sort of point folks to the Wilder

website. We'll talk a little bit about the Rochester Public Schools website. But any additional sort of resources you want to surface as we bring it on home?

Amanda Peterson: Sure. I think two methods that we've used recently in our strategic planning process, there's a well-known tool in the strategic planning world called the SWOT analysis. And what that means is SWOT, S-W-O-T, stands for strengths, weaknesses, opportunities, and threats. Well, more recently, I think folks, just given the pandemic, given that they want more of a results-based strategic plan, given that people are tending to be a little bit more aspirational and that need to be in that head space, we have discovered a new methodology called SOAR, which stands for strengths, opportunities, aspirations, and results, so there's more of a positive looking at those strengths based and kind of what the opportunities are based on strengths, so that's a new method that we've been trying out. And so far, our clients have really responded well to it. They've really liked it, and especially giving it that R piece, where data informed comes in is that results. Not only are we thinking about our strengths, opportunities, and aspirations. But how do we measure to get results in an ongoing way that's meaningful to us and our organization?

So that's definitely one method that we've really kind of latched onto. And I will credit the researchers who have come up with this. And that is Think Insights is what it's called, thinkinsights.net. And then they have a whole kind of a manual online that's free to use that talks about really what the method is and how folks can use this, so that's one that I'll kind of ... What's the word? Endorse.

Heather Britt: Awesome. Awesome. Kent, if folks are interested in kind of seeing your one pager, taking a look at plan, where should they go?

Kent Pekel: The one pager is in revision, but it'll be on our website in a couple of weeks, but the full plan in all its majesty is right there, and so it's rochesterschools.org. And just look for strategic plan. You can find the full document there, and we will have some collateral communications vehicles there in the coming weeks.

Heather Britt: Great, great. And if folks are interested in sort of finding more resources, learning more about Wilder, you're always welcome to go to wilderresearch.org to get more information, to learn more about this particular project, to learn more about data informed strategic planning. So I want to say thank you, a big thank you, to Amanda and Anna, and to Kent for spending some time with us today talking about data informed strategic planning. Good, nourishing topic, lots I think that we learned about the approach, about the things that work well, about the value that it's adding to organizations and communities, so appreciate you all taking the time, and appreciate our listeners for listening in.

If you've got ideas for additional podcasts, future topics for us, I hope you'll let us know. I'm Heather Britt from Wilder Research, and I look forward to talking through the numbers with you on other topics.

[soft piano music]