process

Building the School of the Future
Discovery Brief 01: Methodologies for Strategic Planning

Over the next three years, the School District of Philadelphia and Microsoft will collaborate on the ambitious task of imagining and constructing a "School of the Future." Bringing together the best of what industry and education have to offer, our mission is to create a living blue-print for learning environments in the 21st century.

To get there, we need to capture what we learn, outline key steps, illustrate critical insights, understand challenges, and share the solutions. Discover the process we developed to identify essential outcomes and guide strategic planning for building the School of the Future.

6i Development Process

Step one in building the School of the Future was creating a process that would guide the development team and provide a framework for decision making. The 6i Development Process outlines our methodology and focuses on the six major stages of the project.

Introspection. Establishing pedagogy, culture, project benchmarks, and overall success metrics. Based on objective self-analysis and focused on identifying existing assets and future requirements.

Investigation. Researching and identifying best practices, as well as innovations within other educational models. Fueled by an advisory council of industry experts tasked with reviewing and validating strategies and key decisions.
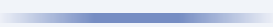
Inclusion. Engaging community leaders, key stakeholders, government officials, and other partners. Designed to foster support and promote concept evangelization.

Innovation. Pushing forward new ideas in everything from building design and information technology architecture to personnel selection. Engaged with developing novel approaches and critical insights.

Implementation. Constructing the actual building, training selected educators and other personnel, and, ultimately, opening the doors to a new generation of students. Grounded in the complex tasks of creating tangible experiences from visionary ideas.

Introspection. Reflecting and reviewing outcomes, as well as formally creating a plan to adjust and continually move forward. Focused on returning to initial concepts and reflecting on their execution and ongoing implementation.

Key Learning: Establishing a strong foundation of ideas and priorities before engaging with the community at large is essential. Involving community members too early in the process risks losing sight of key objectives.

Stages	Duration (36 months)
1] Introspection: 1–3 months	
2] Investigation: 4–6 months	
3] Inclusion: 30–36 months	
4] Innovation: 2–6 months	
5] Implementation: 1–4 months	
6] Introspection: 4–12 months	

These overlapping timelines have been developed specifically for the School of the Future and map directly to the Fall 2006 opening.

Vision & Mission

The School District of Philadelphia has created a systemwide Declaration of Education. The vision and mission of the School of the Future support the principles of the declaration. At its core, the vision of the School of the Future is to create an empowered community, where learning is continuous, relevant, and adaptive. To deliver on this vision, we have developed a mission statement: The School of the Future applies research and development to generate educational practices, creating an environment involving all members; ignites them to take a passionate, personal responsibility for learning; and inspires a commitment to active citizenship.

Key Learning: Innovation doesn't end with the latest technology. Ensuring the constant evolution of instructional practices requires a commitment to ongoing research and development.

Stakeholders

As a segment within the Inclusion development stage, we have developed a community inclusion plan that is spearheaded by five key groups tasked with nurturing school development and providing organizational support.

School Planning Team. This team, formed as part of a pre-existing district practice, serves as an advocate for various constituencies within Philadelphia neighborhoods and helps present the vision and approved plans for the school to the community at large.

Community Advisory Board. This board, comprising key community leaders within West Philadelphia, advises the School District of Philadelphia and Microsoft. Offering a unique perspective that is specific to West Philadelphia, this group augments the School Planning Team's citywide viewpoint.

Curriculum Working Committee. Consisting of education experts from the local district and around the world, this committee works to define and develop the school mission in support of district goals, drives curriculum development, and ensures that all aspects of the school — from professional assets to physical spaces — support curriculum goals.

District Planning Team. Made up of Cabinet-level district officials, this team sets policy and actively governs the implementation of school development — including budget allocations and final design plan recommendations — while also serving as a liaison to the School Reform Commission and Pennsylvania's Department of Education.

School of the Future Advisory Board. Led by national education leaders and organizational experts, this board reviews and offers commentary on strategic plans, provides feedback and insight on design and development activities, and participates with community inclusion teams.

"Every student deserves access to the best educational programs and partnerships that we can provide. The School of the Future is our model for community-based magnet programs, and we are excited about its impact in Philadelphia and how it will revolutionize education through technology and cutting-edge initiatives for generations to come."

Paul Vallas
CEO of the School District of Philadelphia

Learning Environment Principles

The School of the Future is focused on creating a learning environment with three critical attributes: continuous, relevant, and adaptive. [figure 1]

Continuous. Teachable moments should not be limited to the classroom alone. We will create environments powered by 1:1 access to the tools of the digital age to nurture anytime, anywhere learning.

Relevant. Learners are inspired by the connections they make between curriculum and the real world, so the School of the Future will leverage community interaction and the latest instructional tools to increase relevancy.

Adaptive. Individual students learn in individual ways. The School of the Future will not be a one-size-fits-all offering. Instead, we will use technology and adaptive instructional models to effectively and efficiently offer learning opportunities to every student.

Analysis

To develop a highly actionable plan for bringing to life the vision of the School of the Future and achieving the goals outlined in our mission statement, we conducted an in-depth examination of factors influencing development. This essential process included an organizational analysis, identification of success factors, and SWOT (Strengths, Weaknesses, Opportunities, and Threats) assessments — all of which helped inform a comprehensive plan for asset development.

Organizational Analysis. For each goal outlined in our mission statement, we analyzed three core factors: environment, process, and people. Examining the organization through each of these critical lenses both focused our analysis and broadened our perspective. The exercise allowed us to identify critical — and specific — success factors from a much more comprehensive "whole system" point of view. [figure 2]

Critical Success Factor Identification. During a daylong facilitated retreat, the Curriculum Working Committee and other team members identified the five critical success factors that would need to be addressed to achieve our mission.

SWOT Assessments. The Curriculum Working Committee spearheaded a systematic SWOT analysis and then sub-committees shared their assessments with other team members who provided additional feedback and helped adjust the findings. The team identified the strengths and weaknesses within the organization and extended community that will impact achievement of the critical success factors. The team then identified the opportunities the critical success factors could create, as well as the weaknesses that could potentially create an opportunity for failure.
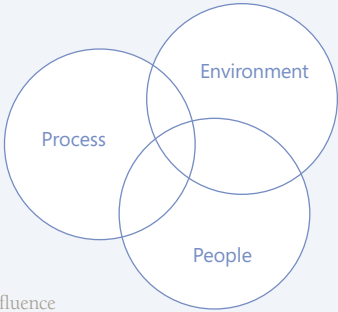
Asset Development Plan. Following the organizational analysis, critical success factor identification, and SWOT assessments, the team was comprehensively informed and prepared to move forward with strategic planning. Specifically, the team was able to identify desired assets that will mitigate challenges and threats and optimize strengths and opportunities. Also, the team was able to map asset allocation according to particular teaching and learning goals.

Key Learning: Clearly defining internal and external threats is imperative to success. Though process-centric, these activities are essential to developing actionable strategies.

[figure 1]

Continuous

Relevant

Adaptive

These new principles are redefining optimal learning environments.

[figure 2]

Process

Environment

People

These interconnected factors influence aspects of organizational development.

Five Critical Success Factors

Based on the results of the organizational analysis, the Curriculum Working Committee identified five critical success factors during an intensive one-day retreat.

Involved and connected learning community. An involved and connected learning community acknowledges that all stakeholders — students, parents, community organizations, higher education, businesses, and others — must participate if we are to succeed. The learning community is a dynamic, vibrant society that incorporates and represents the voices of all constituents. Multiple means for communicating, sharing information, and soliciting input must be established. Digital tools and electronic and print media must support inclusion, eliminating language and socioeconomic barriers. Finally, the learning community must provide opportunities that promote learning as a lifelong process.

Proficient and inviting curriculum-driven setting. The physical setting must support and be conducive to the continuous and changing needs of the learning community. The technical infrastructure must support current and future wireless and fixed technical equipment, and should enable the sharing of all data types. All learning spaces must provide the necessary elements that allow for instruction and learning at all times, and be mobile and flexible to adapt to changes in teaching and learning activities.

Flexible and sustainable learning environment. A truly effective learning environment is one that is fluid and responsive to the ever-evolving needs of community members. Such an environment is adaptable, differentiated, and focused on student-centered instructional models, and allows all students to realize their full potential. The learning environment must limit the dependency on time and place for instructional opportunities to occur and must demonstrate instructional relevancy for students. Also, the environment created must be systemic and independent of changes in faculty and administrative personnel.

Cross-curriculum integration of research and development. To ensure a continuously evolving integrated curriculum, the professional staff, led by the director of research and innovation, must actively incorporate the latest findings in research and development from business, technology, and institutions of higher learning. In addition, the school must act as a learning laboratory where staff and students can design, carry out, and evaluate appropriate projects to enhance the teaching and learning process.

Professional leadership. Professional leadership for the entire community encompasses the abilities to:
1. Positively impact instruction
2. Think strategically
3. Motivate and engage stakeholders
4. Engage technology at every appropriate opportunity
5. Design and present professional development to address identified needs
6. Interact and communicate with the community
7. Demonstrate fiscal responsibility
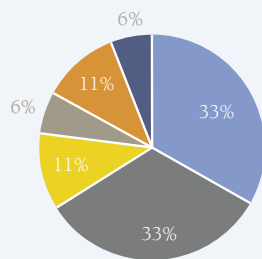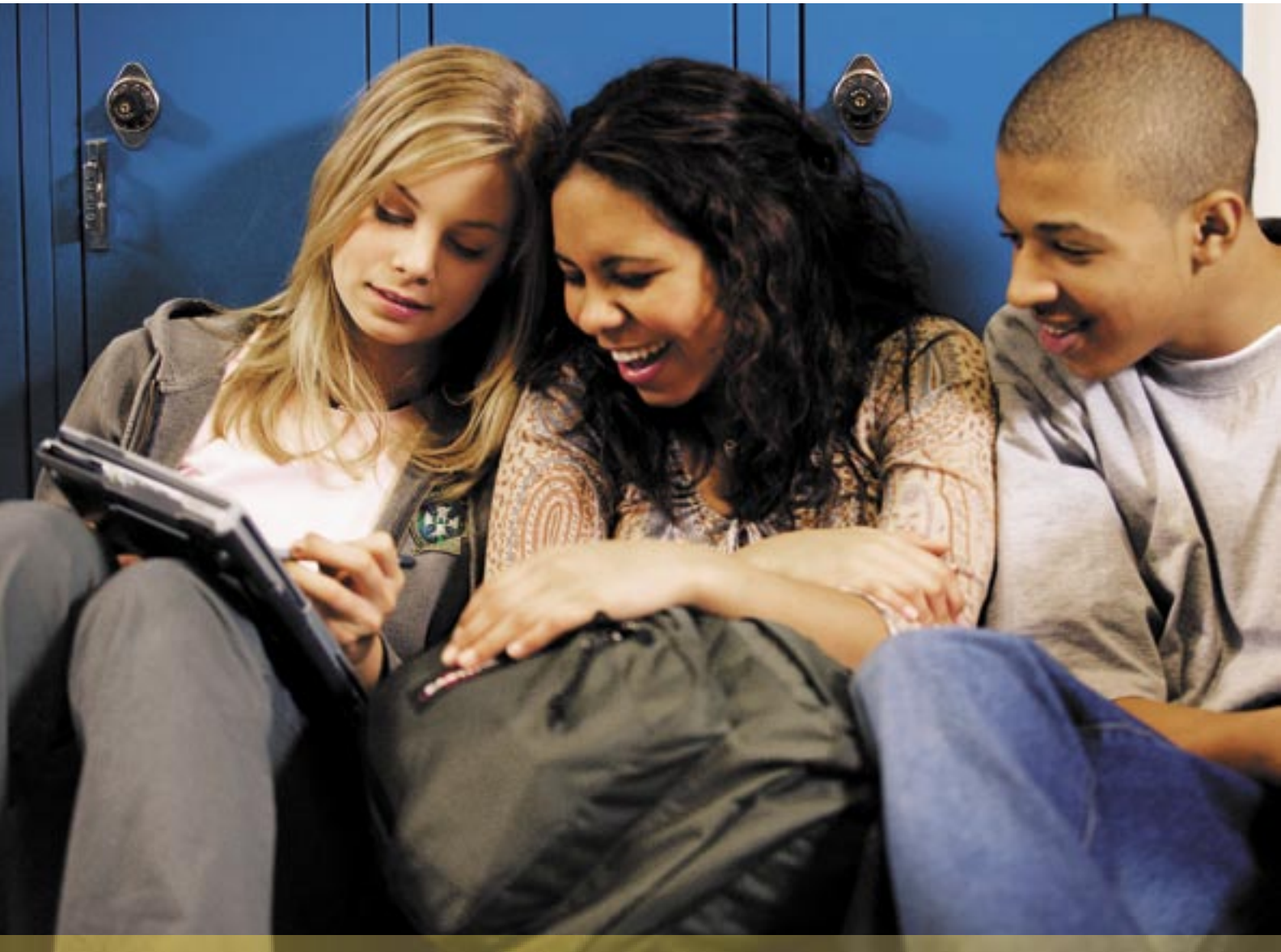8. Continuously evaluate and revise instructional programs in a collaborative manner

Key Learning: Understanding critical success factors from the outset is irreplaceable for accurately and effectively supporting the mission during the planning stages.
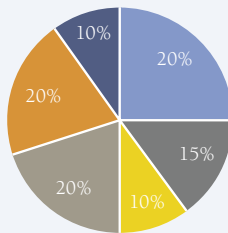
"Technological advancement drives the creation of jobs and influences the way in which we educate our young people. The School of the Future will equip Philadelphia school children with the skills they need to advance to college and gain a distinct competitive advantage in the workplace. This is a once-in-a-lifetime opportunity for the School District of Philadelphia, and the Greater Philadelphia Chamber of Commerce commends Microsoft Corporation for its generous contributions to education."

Mark S. Schweiker
President & CEO, Greater Philadelphia Chamber of Commerce

Strengths

- 6%
- 11%
- 6%
- 11%
- 33%
- 33%

Weaknesses

- 10%
- 20%
- 20%
- 20%
- 15%
- 10%

Opportunities

- 4%
- 21%
- 42%
- 8%
- 21%
- 4%

Threats

- 18%
- 6%
- 28%
- 6%
- 24%
- 18%
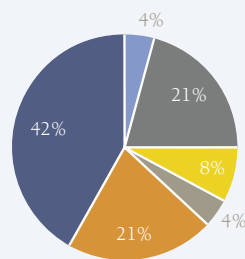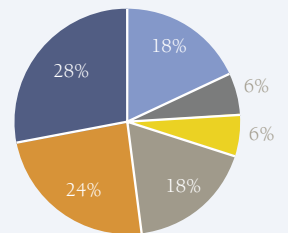
In our SWOT assessments, 42% of opportunities and 28% of threats relate directly to leadership issues, ultimately informing our decision to allocate significant resources in that area.

SWOT Assessments

The SWOT assessments set the stage for critical insights that would ultimately help inform our next steps in asset development planning. Many of the assessments revealed a common theme. For example, an identified strength within the "Involved and Connected Learning Community" success factor is the proximity of community partners to the school itself. However, a related weakness is the need for creative leadership to develop academic programs that link the school with community members. Similarly, one of the key opportunities within the "Flexible and Sustainable Learning Environment" is sharing best practices with other learning institutions as we develop the school. The corresponding threat — making high-profile mistakes, since the School of the Future has no precedent — is also fundamentally a leadership challenge. Within the "Cross-Curriculum Integration of Research and Development" success factor, a core strength is our ability to develop unique partnerships with industry, colleges, and universities. That said, realizing the promise of that strength relies on dynamic leadership to overcome resistance among educators from more traditional models and push them towards innovative cross-curriculum efforts. Put together in a combined analysis, the area with the greatest influence on our success and, therefore, the area requiring the greatest support is clearly evident: leadership.
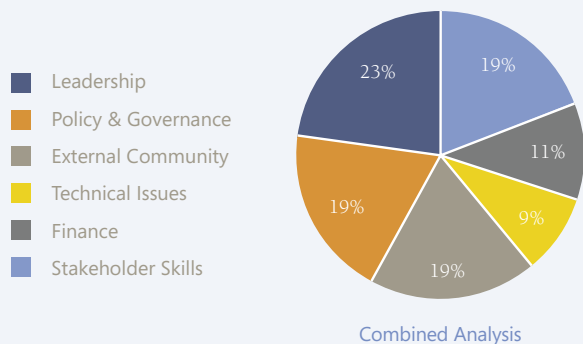
Asset Development Planning

Results of the organizational analysis, identification of success factors, and SWOT assessments clearly illuminated what areas of asset development required the greatest support. Professional leadership topped the list, with other key areas also represented. Breaking down the combined analysis in quantitative terms has allowed the teams to more easily understand the various development needs of the project — policy and governance, community relations, technical infrastructure and support, financial issues, and skill-based requirements — and improve decision making within strategic planning.

Key Learning: Using the analysis process to describe issues qualitatively, then breaking down the qualitative findings into quantitative terms, provides clarity for making complex strategic planning decisions.

For more information regarding this process, including detailed results of the organizational analysis, SWOT assessments, and assets being developed, go to:
www.microsoft.com/education/schooloffuture.aspx

- Leadership
- Policy & Governance
- External Community
- Technical Issues
- Finance
- Stakeholder Skills

23%
19%
11%
9%
19%
19%

Combined Analysis

SWOT (Strengths, Weaknesses, Opportunities, and Threats) offers an analysis framework for understanding complex issues in their simplest terms. Represented quantitatively, SWOT assessments inform high-level decision making.

Partners in Learning

Technology is a powerful tool that can help people, communities, and nations realize their potential. But for millions, the promise of technology is still unrealized. Microsoft Corporation has made a comprehensive commitment to digital inclusion — helping individuals, communities, and nations gain access to the technology tools, skills, and innovation they need to realize their potential in the changing economy. Microsoft's flagship digital inclusion initiative is Partners in Learning.

Despite real improvements in accessing and using information and communication technology in education, many students and teachers still lack basic access to technology and training. The result is a widening skills gap that contributes to disparities in quality of life, competitiveness, and economic development.

Part of the Microsoft® Partners in Learning initiative, the School of the Future is an important example of our commitment to addressing the digital inclusion issues facing education today by providing tools and support that enable educators and schools to deliver on the promise of technology in education.

For more information on Microsoft Partners in Learning, go to:
www.microsoft.com/education/partnersinlearning

www.microsoft.com/education/schooloffuture.aspx