Digital Strategy Toolkit for Schools

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Digital SPIRIT

I created the memorable acronym SPIRIT to prompt people into thinking about the different key areas of technology within a school. Throughout the process of creating a strategy it can be used to ensure that everything that needs to be discussed and covered has been covered and the separate strands are a good way to breakdown what will be a huge planning document into more manageable sections.

Below is an example of some key topics which fall into each strand, in a future version of this toolkit document I hope to explore this in far more detail, however for now this should be sufficient to prompt conversation.

Strategy	**P**edagogy
Governance & Guiding Principles • Steering Stakeholders • Mission, Vision & Guiding Principles • Governance and Communications **Goals & Barriers** • Priorities, Risk & Barriers • Aligned Strategy Map • Development Plan **Benchmarks & Success** • Technology Review • External Indicators • Self-Evaluation Rubric	**21st Century Skills** • Cross Curriculum Engagement • Authentic Learning Experiences • Digital Native Assumptions **Digital Citizenship** • Behavior & Accountability • Internet Safety • Digital Footprint **Frameworks** • ISTE Standards • Evaluation Models (SAMR & TPAK) • Essential Digital Skills
Infrastructure	**R**esources
Connectivity • Internet, Networks & Wi-Fi • Redundancy • Capacity & Growth **Agility** • Soft Systems • Cloud Computing • Identity Management **Security** • Data Protection & Security • Antivirus & Internet Safety • Backup & Disaster Recovery	**People** • Digital Leadership • Dedicated Technology Team • Champions **Sharing** • Collaboration Platform • Centralised Resources • External Collaboration **Support** • Technical Support • Training Programme • Change Management
Insight	**T**echnology
Stakeholder Engagement • Surveys & feedback Capture • Technology Steering • Student Leadership **Assessment & Analytics** • Data Access & Ownership • AI / Adaptive Learning Tools • Formative Feedback Capture **Business Intelligence** • Reporting & Triggers • Data Dashboards • Project Tracking	**Hardware** • Devices • Presentation Tools • Specialist Equipment **Applications** • Core Platform • Functional Tools • Learning Tools **Innovation** • Environment & Culture • Innovation Encouragement • Success Replication

Digital Steering Group

The first and most important action you must take on your road to building your digital strategy is to assign the right people to the task.

The impact of technology is significant across the entire school, it is adopted by functional departments as well as all areas of education. Please do not make the mistake of assigning this task solely to the school IT manager, it should be a collaboration between technical, functional, academic and leadership staff to ensure that all requirements are captured and goals are agreed aligned to support already established strategies.

I recommend that a Digital Steering group is formed and led by an appropriate member of the senior leadership team. I would expect the group to comprise of the following members key members:

- IT Manager
- Data (MIS) Manager
- Ed Tech Lead
- Bursar / Business Manager (representing functional teams)
- A senior leadership representative from each school (either heads & deputies etc. representing academic teams)

Optional I would also extend the invitation to:

- Finance Manager
- Admissions & Marketing Manager
- Operations Manager
- Heads of academic ICT/Computing department
- Technology Champions (members of staff without official accountability but are well know for their enthusiasm to harness technology within the school)

Obviously, this list is flexible to work with your own schools staffing structure, but the point is clear that the steering group should not just be made up by technical staff.

The group should meet on a regular basis to suit the school to build, review and update on progress in delivery of the digital strategy, I recommend once per month as a reasonable timing.

In the initial strategy design phase, the team will need to meet more frequently and work closely together to build the document but then should settle into a routine moving forwards.

Someone in the team should be selected as the group secretary to ensure agendas are on point, minutes are kept and action accountability recorded.

Technology Review

Taking stock of our current use of technology is a key next step, we need to understand where we are before we can plan to get where we want to be. Schools should either complete a thorough review of use of technology in house by the steering group members or if capacity does not allow outsource to a company who can do this for you. I would expect an individual to be able to perform a deep detailed dive into the school's technology provision within a week.

The reviewer should speak to as many staff as possible and with appropriate approval students and parents also. Some key teams to meet with include:

Leadership, Academic HoDs, MIS/Data, IT, Bursur/Business Manager, Finance, HR, Admissions & Marketing, Operations/Facilities, Ed Tech Coaches, Curriculum Manager, Assessment Manager, CCA/Trips/Events, Timetabler, Librarian, Careers, Councillor.

The discussion should be to record the schools use of technology which may be recorded in the following categories:

Function Specific	How this person/team uses technology every day for their role. There will be many different questions depending on if this is teaching or functional – ask them to describe what they use technology for.
Data/document Management	How does the person/team manage their data? what platforms? where is data saved? how do they collaborate and share data?, do they backup their work? Etc.
Devices & Infrastructure	What kinds of devices do they use? is the device fit for purpose, how is the internet connection for this person? > do they need any other hardware ?
Policy & Processes	What is the user/teams understanding of the school's technology policies, data protection, internet security etc.
Training Requirements	If they could have any technology based training – what would they like?
Suggestions Capture	Open question: how can we help you with your work? – they don't need to provide technical requests, just in plain terms what would they like some help with – often digital solutions will become clear based on simply phrased issues.

Once you have a completed the review the steering group will have a good set of information to work with as a starting point for building your strategy. I suggest that everyone makes themselves familiar with the contents of the report and drafts a few key items they would like to ensure are included in the strategy.

Strategy Design Day

Now we need to come together and start to build our digital strategy, this can of course be completed through a series of short online or in person sessions spread over time, however in my experience the best way to kickstart the process is to have a full day of design – take the steering group off schedule, and away from the distractions of their usual working environment and get stuck in, you will find that by the end of the day you are very well placed to finish the document remotely having worked through the main healthy debates in your physical brainstorming sessions.

The steering group secretary should organise and lead the meeting, ensuring that topics of conversations are on point and timing is well considered.

Having some non-digital resources to make people feel comfortable collaborating during the session is useful - (just because we are talking about tech it doesn't mean we have to use tech!)

I recommend:

- Projector & Screen
- WiFi Internet Access
- Enough power sockets for everyone
- Tables and Chairs (preferably movable so you can have all together or split into smaller working groups)
- Flipchart paper books (A3, A2 or A1)
- lined writing paper books (the ones where you can easily tare off sheets), A4 Printer Paper
- Pencil sharpeners, Erasers, Box of pencils, Packs of highlighter pens, Packs of Marker Pens, Box of blue or black Biro pens, Box of Red Biro pens
- Sheets full of stickers (doesn't matter if they are dots, smiley faces or anything else – at least 20 stickers on each sheet)

Also don't forget to arrange some refreshments to keep feeding people brains – happy people are productive people! Also, by included sufficient breaks to allow for comfort and to check emails etc. it is reasonable to ask the team to be fully engaged in the session.

I would expect the structure of the day to look something like the following:

- 08:30 - Arrival & Coffee
- Discussion & Brainstorm
    - 09:00 - SWOT Analysis (30m)
    - 09:30 - Immediate Priorities (60m)
    - 10:30 - Break (30m)
    - 11:00 - Blue Sky Thinking (60m)
- Strategy Document Creation
    - 12:00 - Mission, Vision & Guiding Principles Work (30m)
    - 12:30 – Lunch (60m)
    - 13:30 - Strategy Map (45m)
    - 14:15 - Evaluation Rubric (45m)
    - 15:00 - Break (30m)
    - 15:30 - Development Plan (45m)
    - 16:15 - Governance & Communication Model (30m)
- Agree Next Steps*
    - 16:45 - Next Steps (30m)
    - 17:15 - Finish

The objective for the day is to brainstorm the key elements, make a start on the strategy document, and have clear accountable next steps for completion of the strategy – these next steps much be agreed at the end of the day to ensure continued momentum from the session.

Strengths, Weakness, Opportunities, Threats (SWOT)

A good place to start the conversation is with a SWOT analysis based on the technology review report, if you are unfamiliar with SWOT check out this guide.

Use the information in the technology review along with your own experience complete the table below with significant plot them into the SWOT analysis table below. You may wish to do this individually or in small groups and consolidate or you may do this as a round table brainstorm. You should aim to populate at least 5 items into each section (SWOT), but don't be afraid to add more if required.

Record the SPIRIT alignment next to the items to ensure you have a balanced view of technology, if any SPIRIT strands are not well represented, they should be discussed further. A balanced view is critical to success. (Don't worry about the investment column, that is used in the next exercise)

STRAND (SPIRIT)	STRENGTHS	INVESTMENT

STRAND (SPIRIT)	WEAKNESSES	INVESTMENT

STRAND (SPIRIT)	OPPORTUNITIES	INVESTMENT

STRAND (SPIRIT)	THREATS	INVESTMENT

Immediate Priorities

Using the SWOT analysis table created in the last exercise, you should now prioritise your items, this quick individual exercise should allow you to understand each other's priorities and come to some general alignment as to where investment needs to be made.

Individual Priorities Exercise (Spend a Dollar)

Task: "If you have 1 Dollar (100 Cents) to spend on the items listed in your SWOT analysis, to build on your strengths, tackle your weaknesses, nurture opportunities, and mitigate threats how will you personally invest the money? – record the amount of cents you would like to invest in the column within the SWOT table"

Team members spend 5-10 minutes to figure out where to invest, they can choose not to invest in items, invest heavily in certain areas or split evenly across many items.

Presentation and discussion of similarities and disagreements leading to introduction group consensus on immediate priorities.

Blue Sky Thinking

You now have a map of where you are (Tech Review), and where you want to go first (Prioritised SWOT), next we need to look where you want to be eventually. > Blue Sky Thinking.

This is an open brainstorming session where the sky is the limit, we need to describe what the utopia of embedded technology looks like for the school. Don't worry about budget and change management etc. in this exercise we are free to break any barriers and innovate – our shared vision for the future.

For each of the SPIRIT strands collaboratively lists the key items that make up your digital utopia.

Strategy	
Pedagogy	
Infrastructure	
Resources	
Insight	
Technology	

Mission, Vision & Guiding Principles

I am sure you are familiar with the concept of mission and vision – its good to create one aligned to the school's main statements but clearly focused on use of Technology. The technology mission and vision statements will be used in marketing and to establish the culture and expectations for the school's relationship with technology.

For inspiration just google" Ed Tech Mission and vision" as see what competitors are presenting.

Technology Mission and Vision Statement

The technology guiding principles are a broad philosophy that encompass our beliefs and values and guide us during the approval and prioritisation process for any new projects. These should align to your mission and vision as well as your local context and culture.

Here is an example of what they might look like, but its is important to create your own!

1. Maximising student outcomes must be at the heart of all technology decision-making
2. Technology should support collaborative communities across our 'family of schools'
3. Pioneering, innovative technologies will be evaluated as part of any solution
4. Technology should enable a coherent Digital Journey for all stakeholders
5. Technology should offer an intuitive and enjoyable user experience
6. Technology will be sustainable, scalable and efficient, with technical diversity controlled.
7. Aim to purchase off the shelf rather than develop in-house bespoke solutions
8. Technology must comply with the regulatory environment
9. Data will be secure, handled ethically and support analysis
10. Technology staff will foster a culture of comfort with technology and empower users to innovate and improve process

Technology Guiding Principles

Strategy Map

You now have rough information on where you are, your immediate priorities and your target utopia digital ecosystem. We need to represent these in a strategy map that will allow all stake holders to see clearly what we wish to achieve.

A strategy map is high level and simple to understand for non-technical stakeholders it will not include specific projects, budgets, specific timelines etc. but instead key statements on our objectives as we move form the now into the short term and long term.

We can display our strategy maps as a matrix using the information, we already have aligned to the SPIRIT strands.

	Improve	Grow	Innovate
Strategy			
Pedagogy			
Infrastructure			
Resources			
Insight			
Technology			

- We list items that we are already working on in improve – the short term < 12 months
- We list items from our Prioritised SWOT in grow – the mid-term < 3 years
- We list items from our Blue Sky thinking in Innovate – the long term <5 years

How many items you add to the map is up to you, but I would recommend no more than 3 for each strand.

Here is an example of what some items might look like, note that each item is different not the same item progressing throughout the stages:

Pedagogy

	Improve	Grow	Innovate
Pedagogy	1. ISTE aligned Scheme of Work. 2. All stakeholders understand and practise e-safety. 3. Student and staff agency in use of technology.	**4.** Embedding of digital citizenship across the curriculum. 5. Technology consideration from unit planning stage. 6. AI driven content curation.	7. Authentic collaboration experiences with industry. 8. Students have rich personalised learning experiences. 9. Innovative and entrepreneurial culture

Evaluation Rubric

To monitor progress in delivery of the strategy it is useful to create an evaluation rubric based on your Strategy Map.

Each strategic objective should be accompanied by 3 KPIs describing the key milestones to successful delivering the objective to the desired level. The schools progress towards achieving the KPIs can be measured on a regular basis to be determined by the Steering Group (I recommend a review every 6 months)

Here is an example of what Rubric items might look like, I have chosen the terminology Emerging, Developing and Target to show the progress towards the objective.

Pedagogy - Leveraging Technology to Redefine Learning

- **Emerging KPI:** Students are able to work alone when using technology, however the teacher is their primary source of information.
- **Developing KPI:** Students independently use technology tools in conventional ways for collaboration and connecting new and existing knowledge.
- **Target KPI:** Students regularly use technology tools for collaboration, to construct and share knowledge in ways that may have been impossible without technology.

Rubric Scoring Example – Pedagogy Strand

Strand	Objective	December 2021 Review	June 2021 Review
Pedagogy	1. ISTE aligned Scheme of Work.	Target (Score 3)	Target (Score 3)
	2. All stakeholders understand and practise e-safety.	Target (Score 3)	Target (Score 3)
	3. Student and staff agency in use of technology.	Developing (Score 2)	Developing (Score 2)
	4. Embedding of digital citizenship across the curriculum.	Emerging (Score 1)	Developing (Score 2)
	5. Technology consideration from unit planning stage.	None (Score 0)	Emerging (Score 1)
	6. AI driven content curation.	Developing (Score 2)	Developing (Score 2)
	7. Authentic collaboration experiences with industry.	None (Score 0)	None (Score 0)
	8. Students have rich personalised learning experiences.	None (score 0)	None (score 0)
	9. Innovative and entrepreneurial culture	Emerging (Score 1)	Emerging (Score 1)
Strand Total		12	14

Development Plan

This is the real detail of the strategy it is what you might call a development plan or roadmap. You should record all your initiatives from simple quick wins to complicated migration projects. You will develop a prioritisation method based on impact, cost, difficulty, alignment with the strategy map and guiding principles. If its not on the plan you should not be spending any time or money on it.

The plan should be published within the school and there should be a process for requesting additions communicated to all stakeholders, it is a living document that will be constantly updated and can be used to forecast budget and manage resources.

You should use whatever platform works for you to track your initiatives, I like Monday.com but a simple spreadsheet will be just fine. Below is an example of the some of the columns I would expect to find on the plan along with an example of the information, of course you should amend and add for whatever works in your context, the important part is making sure there is alignment with the strategy map objectives and that a prioritisation analysis has taken place.

Column	Sample Data
ID	000001
Initiative	Implement Adaptive LMS
Description	To Identify and implement a new adaptive learning management system in secondary school.
Requester	Deputy Head of Secondary School
Strategy Strand	Pedagogy
Strategy Objective	6. AI driven content curation.
Date Raised	01/05/2021
Technology Lead	IT Manager
Priority Analysis	75%
Expected Cost	15,000 RM
Expected Time	3 Months
Analysis Document	[FILE ATTACHMENT]
KPI Targets	• Product selected and implemented within budget • System live within project timeframe. • Positive user experience feedback. • Improvement in content provision for learning gaps.
Approval	Mr Headteacher – 15/06/2021
Initiative Status	Approved
Implementation Plan	[FILE ATTACHMENT]
Completion Date	

The significant information for the approval process is the priority analysis and expected cost, the higher the priority and the lower the cost the sooner this initiative should meet approval for implementation. The priority analysis should be a scoring system a score should be given to each criteria based on the table below, which when combined and doubled will result in a priority score between 0 and 90% (no initiative is every 100% for approval – there is always a decision)

0	3	6	9
None	Reasonable	Positive	Very Positive

Criteria	Description	Score
Compliance Mitigation	is this a requirement coming from government / business owner etc.	0
Customer Value	what will be the value to the key stakeholders.	6
Strategic Alignment	How closely does this align to the Strategy Map Objective KPIs & Digital Guiding Principles.	9
Ease of Implementation	what is the expected drain on resources to deliver this.	9
Cost of Implementation	what is the expected cost to deliver and support this.	6
	Total (X2)	60 %

Governance & Communication Model

Through our collaborative discussions we now have the raw makings of a strategy, to be able to develop this raw content into a robust document to guide and govern our investment we must define a consistent rhythm of working, with clear accountability and a comprehensive communication model.

You should look to define and agree the following:

- **Steering Meeting Cycle** – how often the group meets, standing agenda items etc.
- **Strategy Map Review Cycle** – when and how the strategy map will be reviewed.
- **Development Plan Budget Alignment Process** – How to align current budget process with authorisations of planned items
- **Development Plan Update Cycle** – how to publish updates on items within the plan
- **Development Plan New Request Process** – how people raise new items for consideration

A great tool to help us build accountability models is to use RACI matrix

If you are unfamiliar with RACI method check this out.

Example RACI for Development Plan new Requests Management

Assuming IT Manager as main project manager:

Item	Responsible	Accountable	Consulted	Informed
Raise Request	Requestor	Requestor	IT Manager	Steering Group
SPIRIT Alignment	IT Manager	IT Manager	Steering Group	Requestor
Request Investigation	Appropriate Steering Group Lead (see below)	IT Manager	Requestor	Steering Group
Priority Analysis	Appropriate Steering Group Lead (see below)	IT Manager	Steering Group	Requestor
Authorise Request	Budget Holder	Principal	Steering Group	Requestor
Project Management	• Appropriate Steering Group Lead (see below) • Requestor	IT Manager	Impacted stakeholders	All Stakeholders

* Example Steering Group Accountability for Leading on Projects:

S – SLT Representatives

P – Ed Tech Lead

I – IT Manager

R – SLT Representatives

I – Data Manager

T – IT Manager