**Resource Mapping Your Strategic Objectives and Initiatives: Consider Resources, Scope of Impact and Implementation Timeframe**

**What is Resource Mapping and why is it Important?** Once the planning team has settled on strategic objectives and initiatives, the next logical question is, “Where do we start?” Most districts will not have the capacity to begin implementation of every objective and initiative on Day One of the plan. This step is designed to inform and build consensus around the order in which the initiatives can best undertaken over the 3- to 5-year life of the plan. To help align resources and sequence implementation to create clear, achievable priorities for each plan year, a team or teams will consider, estimate and rate three resource-related factors for each initiative: the resources [staff, time, materials and money] needed to implement, the scope of the impact, and how much time full implementation will take. Using the estimates for these factors, teams will then map a suggested implementation sequence for the 3-5 years of the plan by setting priorities for each year.

If a larger planning team participates in this exercise, the district can use it to build broad-based support for budget items and resource shifts, as well as consensus for the priority initiatives for each year of the plan. This exercise will also provide an opportunity for teams to discuss ideas for resourcing initiatives, which can then be carried over to the action-planning phase. Sequencing that considers district resource capacity, realistic timeframes for implementation, and the scope of impact for each initiative will help with both with success of implementation and a shared understanding of how the plan will unfold over its lifetime.

Note that resource mapping does not ask teams to rank objectives and strategies by a vote of what is most important. This process assumes that all of the strategies and objectives have been included in the district or school plan by the planning team because of the importance and impact each will have on teaching and learning. Instead, resource mapping asks the team to consider factors affecting district capacity and then suggest a sequence for implementation that will allow district resources to be available when implementation begins.

**Set the teams:** Either in small groups or using the leadership team, fill in your strategic objectives and initiatives from the completed district or school plan on the Resource Mapping worksheet (this can be done in advance by the facilitator). If you are convening a group that did not all participate in planning, consider including some planning team members in each group to respond to questions about the initiatives and objectives.

**Introduce the Resource Mapping Process (Slide 1-8):** Introduce each of the factors: resources, scope of impact, and implementation timeframe, as well as how to use the ratings for each. Use 2-3 examples, ideally strategic initiatives from the school or district plan, to allow teams to become comfortable with the ratings and raise any questions that may come up.

Once teams have rated 2-3 initiatives, present ways in which this information may inform sequencing of initiatives. For instance, teams may want to prioritize initiatives that can be implemented quickly (in one year or less) and have either a large scope of impact or modest to low resource requirements (or both!) in the first year of the plan to realize early success and build momentum. Other initiatives that will take more resources and/or lead time to implement may be prioritized over multiple years of the plan to allow sufficient planning and phasing of resource shifts or new funding.

While it will be most helpful to have gone through and rated all strategic objectives and initiatives prior beginning resource mapping, to introduce the activity, teams should sequence the two or three that they have rated to get a feel for the activity.

The time required for these introductory activities is approximately 45 minutes to 1 hour.

**Conduct the resource-mapping workshop (Slides 9-10):** Organize into teams and begin the resource-mapping workshop. Each team will use the Resource Mapping worksheet to document the results of their discussions (set up for a 3-year plan; columns can be added for plans covering more years). For objectives that are broken into multiple initiatives, only the initiatives should mapped. Stand-alone objectives (those without initiatives) should be mapped as well.

Strategic objectives and initiatives can be broken up among the teams for the rating part of the activity if time is an issue. The teams could then come together and report out their ratings. The larger group could then discuss and finalize ratings and go on to sequence priorities for each year of the plan. In the alternative, teams could rate all objectives and initiatives and suggest sequencing as a first step. As a second step, the teams would come together and share ratings for each initiative, as well as suggested sequencing. The facilitator can then focus the group conversation on the individual team’s ratings or move directly to the mapping of the initiatives.

**Time Required:** Depending on how the rating and sequencing steps are constructed, the process could take from 1.5 – 2.5 hours for the initial teamwork and then approximately 1.5 hours for the larger group discussion. The time for this process will depend on the number of initiatives and objectives that are being mapped, as well as how the objectives and initiatives are assigned to the teams. Teams may find it helpful to appoint a timekeeper to make sure there is sufficient time for each initiative.

**Note to Facilitators:** The resource mapping process is designed to develop consensus for and understanding of the order in which the district tackles the objectives and initiatives informed by the district’s resource capacity. While team members may have their own sense of priority among the objectives and initiatives, this activity is designed to build a sense of ownership for the successful resourcing of the entire plan. The superintendent and/or the facilitator should emphasize that this activity is not about voting for personal favorites or revisiting the initiatives and their importance, but about prioritizing each initiative at the right time in the plan cycle to ensure necessary resources are available.

**Slide 1: Resource Mapping Factors**

* For each strategic initiative or objective, rate:
	+ Resources required: People, time, materials and money
	+ Scope of impact: Targeted, broad or districtwide (or schoolwide)
	+ Time to Implement: How many plan years?

**Slide 2: Rating resources**

* Ratings:Low ($), Moderate ($$), High ($$$)
	+ Consider all resource shifts and “asks”
		- Includes shifting existing staff/staff time and materials to new purposes, not just new dollars
	+ Estimate resources based on your experience – exact dollar figures are not required

**Slide 3: Resource questions**

* When forming a rating for each initiative, these questions may help:
	+ What new people/staff do we need for this initiative (teachers, administrators, contracted service providers, coaches, school adjustment counselors, leadership staff, parents, coordinators, etc.)?
	+ Whose time will be needed (existing administrators, teachers, specialists, central office staff, etc.)?
	+ What materials will we need (new curriculum, technology, equipment, space (classrooms, athletic space, etc.))?
	+ What new funding will we need (Budget appropriations, student fees, grants, donations, etc.)?

**Slide 4: Rating Scope of Impact**

* Ratings: Targeted (T), Broad (B), Districtwide (D)
* The scope of the initiative will likely affect the resources required
	+ E.g., a third-grade reading initiative (T) vs. providing civics curriculum in all middle schools (B) vs. districtwide PD on trauma-sensitive instruction (D)

**Slide 5: Rating Implementation Timeframe**

* Ratings: One year or less (1); More than one less, but less than 3 (2); More than 3 (3)
* Estimating how long the initiative will take to implement will help with sequencing and making needed resources available

**Slide 6: Sequencing Initiatives**

* Using the ratings decided by the team, map a suggested sequence for assigned initiatives by indicating which should be the priority for each year of the plan

**Slide 7: Considerations**

* As you map, consider:
	+ Resource issues that may require lead time before implementation is possible:
		- Hiring Staff
		- Obtaining new budget appropriations
		- Shifting staff/staff responsibilities
		- Negotiating contracts
		- Changing school/staff/student schedules
		- Recruiting volunteers

**Slide 8: Considerations (continued)**

* As you map, consider:
	+ How to maximize early impact with readily available resources to build momentum
		- Are there relatively low-cost changes that have broad impact in Year 1 or 2?
	+ If an initiative will take more than a year to implement, should it be prioritized in Year 1 or 2?
	+ Are there initiatives that will save resources if implemented together?

**Slide 9: Drafting Resource Mapping Ratings**

At your tables, select ratings (Resources, Scope of Impact, Implementation Timeframe) for each of these initiatives:

* + - Implement a PK-12 social and emotional learning framework
		- Engage families as partners, with differentiated opportunities for engagement and voice
		- Explore changing high school start times as a means to support student wellness

After developing ratings, suggest which year of a 3-year district plan each should be prioritized.

**Slide 10: Group Presentations**

* + - What ratings did your group develop?
		- How did you sequence the initiatives and why?

**Slide 10: Resource Mapping Workshop**

* + - Organize into resource mapping teams
		- Identify a facilitator and recorder
		- Complete a resource mapping worksheet for all or the group of strategic initiatives assigned to your team
		- What are the resources (people, time, money and materials), both new and re-allocated, that we need to implement each initiative? Estimate and rate.
		- What is the scope of impact for each initiative? Estimate and rate.
		- What is the implementation timeframe for each initiative? Estimate and rate.
		- Using your ratings: How should the initiatives be prioritized for each year of the plan?

**Resource Mapping Worksheet**

|  | **Resources: Assess people, time, materials, and money required for the initiative, new and reallocated/existing**Low ($), Moderate ($$), High ($$$) | **Scope of Impact: How many students or educators will this initiative reach?**Targeted (T); Broad (B); Districtwide (DW) | **Implementation Timeframe: How long to get this initiative up and running?*** (1) One year or less
* (2) More than one, but

 less than three * (3) Three years or more
 | **Prioritizing and sequencing initiatives and objectives:** Considering resources, impact and implementation, **when should each objective start over the course of the district/school plan?** (mark multiple years if initiative will take longer to establish) |
| --- | --- | --- | --- | --- |
| **Priority for****Year 1** | **Priority for****Year 2** | **Priority for****Year 3** |
| *Example:* *Initiative: Establish a multi-sensory kindergarten that is sensitive to children who have experienced trauma.**[Note: Explanations are optional]* | *Moderate ($$)**[Why: PD for kindergarten teachers; additional training for school adjustment counselor; new part-time school psychologist; purchase of trauma-sensitive curriculum (new expense)].*  | *(T)**[Why: Targeted to kindergarten students]* | *(1)**[Why: Should take one school year to get all of the components accomplished or put into place]* |  | *x* |  |
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