



Independent Schools  
Association of the Southwest

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# TOOLKIT

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## Activities for Self Study

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## Modified SWOT Analyses

Early in the process the Steering Committee plans a school-wide engagement activity. The purpose of this activity is twofold. First, as a SWOT analysis, it generates substantial qualitative data that drives all future inquiry. Equally important, the activity is stimulating and builds relationships across departments and divisions, as individuals come together to share their stories.

The ISAS Toolkit offers three modified SWOT analyses with Facilitator Guidelines and Worksheets:

1. **Artifactivity:** Personnel bring three objects from their professional lives: one is a source of pride; one is something that needs work or more attention; one represents a hope. Administrators, faculty, and staff reflect on these objects, their symbolism, and their value to their professional lives and the school.
2. **Love Letter / Breakup Letter:** Personnel select an object from their professional lives that is significant and instrumental. They write both a love letter and a breakup letter to the object, providing substantive feedback for each. Administrators, faculty, and staff share their letters with one another in small groups to elicit discussion.
3. **Best Day / Worst Night:** Personnel imagine the most beautiful day on campus, a time when all seems right. They answer the following questions: What is happening that makes the day so wonderful, so fulfilling? What are you most grateful for? Next, personnel imagine a sleepless night and answer: What keeps you awake? What might happen if the issue isn't addressed?

None of the above are required. Schools have the freedom and encouragement to pursue different forms of SWOT analysis and to be inventive in ways that catalyze their communities. However, it is recommended that, no matter the tool, schools include an “**Anything else...**?” option during the activity. The latter allows for personnel to express anonymously anything positive or negative for the Steering Committee. Copies of this form should be available to every group, and time should be allotted in the process for its completion.

## Techniques for Prioritization

The Self Study II process requires schools to determine an equitable way to prioritize 3-5 themes into Focus Areas for further study and development.

The ISAS toolkit offers two techniques for prioritization: one for a large group, e.g. all school personnel, and the other for smaller groups, like the Steering Committee, Board of Trustees, etc.

1. **Condorcet Poll:** This type of poll asks respondents to rank-order every choice from a list. It is especially useful to understand the opinions of “larger” groups (20+). Cornell University provides a reliable and free Condorcet Internet Voting Service: [https://civs.cs.cornell.edu/civs\\_create.html](https://civs.cs.cornell.edu/civs_create.html)
2. **Modified KJ Technique:** Intended for “smaller” groups (5-20), this popular and effective technique for achieving consensus is conducted by a facilitator. Group members remain silent throughout the process so that social pressures will not influence the outcomes.<sup>1 2</sup>

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<sup>1</sup> Hanington, B., & Martin, B. (2012). KJ technique. *Universal Methods of Design: 100 ways to research complex problems, develop innovative ideas, and design effective solutions* (104-105). Minneapolis, MN: Rockport.

<sup>2</sup> Spool, J.M. (2004, May 11). The KJ-Technique: A group process for establishing priorities. *User Interface Engineering Articles*. Retrieved from [https://articles.uie.com/kj\\_technique/](https://articles.uie.com/kj_technique/)

## Interviews, Focus Groups, Shadow Days

Each Research Group explores deeply and refines a Focus Area while defining pathways forward. Utilizing qualitative tools, such as interviews, focus groups, and constituent shadow days, Research Groups build understanding of practices, behaviors, and lived experiences.

1. **Interviews:** There are several resources for interview techniques. Dev Patnaik's *Needfinding: Design Research and Planning* is the innovation industry's go-to for best practices. Central to this approach is that interviewers skillfully evoke stories through open-ended questions while remaining open and receptive listeners. Recording the interviewee's exact words is essential for accurate data and interpretation.
2. **Focus Groups:** Guided by a skilled moderator, a small, select group of peers can yield valuable insights into a range of issues. The Center for Community Health and Development at the University of Kentucky offers a well-researched overview of this technique through its Community Tool Box: <https://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/conduct-focus-groups/main>. In addition to the outline, the online and print resources cited below the article may be of special interest.
3. **Constituent Shadow Days:** A popular information-gathering and empathy-building technique, "shadowing" various school constituents for an entire day is a powerful experience. For shadowing students, the best online resource is "Shadow a Student Challenge" (<http://shadowastudent.org/>) which provides a 27-page toolkit with worksheets. The latter can be adapted to most other constituents.

## ARTIFACT *ivity* Guidelines and Worksheets

### Objectives

- To gather substantial qualitative data regarding strengths, challenges, and opportunities from administration, faculty, staff, and any other personnel the school wishes to include (“participants”) in the Self Study II process
- To bring together different school constituencies for an engaging, community-building activity

### Time Required

- 1 hour for participants to complete the **worksheet** prior to the activity
- 1-1.5 hour/s to run the activity
- Follow up as needed

### Materials

- Space large enough to host comfortably all participants
- Pens and/or pencils and scratch paper at every table
- Copies of **Anything Else...?** at every table

### Preparation

- Schedule a time for all participants to come together
- Inform participants of the purpose of the activity
- Provide the **worksheet** and instructions with sufficient time for completion
- Assign participants to mixed groups of 5-6 and notify them of their assignments
- Ready all supplies and photocopies

### Considerations

- The activity works best after several weeks of school so that participants are oriented to the school year and ready to think carefully about current practices and systems.

## Step 1 – Organize

*The Steering Committee organizes Artifactivity.*

- ☐ Select a day/time for the activity that allows participants to be “in the full swing of things”
- ☐ Arrange for venue, tables, and seating to accommodate participants
- ☐ Create thoroughly mixed groups of constituents (5-6 per group)
- ☐ Plan the Self Study II/Artifactivity “Pitch”
- ☐ Appoint a Facilitator for Artifactivity and share the Facilitator’s Guide (Step 5 below)

## Step 2 – Energize

*The Head of School, Self Study Coordinator, and/or a member of the Steering Committee pitches the Self Study II Process and describes the opening, school-wide engagement Artifactivity.*

- ☐ Think of the “pitch” as a model lesson at the beginning of a unit of study.
- ☐ Frame the process as vital, engaging, forward-thinking, and productive.
- ☐ Use language that inspires participants to be reflective and open-minded.
- ☐ Express authentic hopes.
- ☐ Describe the first steps in the process, the constituent surveys and Artifactivity. Consider having one Steering Committee member share her/his artifacts and explanations. (Set high expectations for thoughtful and thorough work product.)

## Step 3 – Ready

*The Steering Committee prepares for the activity.*

- ☐ Provide participants with the worksheet and sufficient time for completion. Reiterate the need for thoughtful and thorough responses. Participants should bring either the objects themselves or pictures of the objects to the activity.
- ☐ Communicate group assignments at an appropriate time.
- ☐ Make all necessary photocopies and collect supplies.
- ☐ Email reminders for the day/time the week of the activity.

## Step 4 – Engage

- ☐ Room set-up includes
  - tables and chairs for groups of 5-6;
  - pens/pencils, scratch paper, copies of **Anything else...?** worksheet on every table;
  - snacks/drinks provided;
  - Projector/equipment for visual displays
  - upbeat music
- ☐ Provide a clear way for participants to know at which table to sit
- ☐ A method of taking attendance if necessary

## Step 5 – Facilitator’s Guide

*The Facilitator guides the process with introductory remarks, check-ins, and concluding instructions.*

### OPENING

- Welcome all participants and restate the purpose of the activity.
- Express excitement for this unique moment.
- Provide an agenda and a timeline. The 1-1.5 hour/s-long activity will include time to:
  - Share the objects and stories from our professional lives
  - Ask each other questions to understand better our distinct work lives and delve deeper into our strengths, challenges, and opportunities
  - Report anything else on our minds – positive or negative
  - Reflect on take-aways as a community-building experience – *I like, I wish, What if?*

### ACTIVITY

#### Share & Question (40-60 Minutes)

- Encourage groups to ask questions and take notes.
- Every word and thought are valuable to this process.
- Members should gently probe strengths, challenges, and opportunities for clarity and information.

#### Anything Else...? (10-15 Minutes)

- Allow participants to fill out the Anything Else...? worksheet. Explain that it’s anonymous and meant to capture things that weren’t said because of a lack of time or because of sensitivity.

#### Reflection (10-15 Minutes)

- Ask: What’s your take-away? Encourage participants to formulate a statement with one of the following sentence-starters: *I like, I wish, What if?*

### CLOSING

- Have a member from every group share one take-away.
- Thank all participants for their invaluable participation
- Have a member from every group collect all the papers and bring them to the Facilitator.



activity worksheet  
**ARTFACT** *ivity*

Select three artifacts from your professional life. (1) represents something *I'm proud of*. (2) represents something *I/We need to work on*. (3) represents something *I wish for*. Think on three levels: individual, department/division, and school-wide. Bring your artifacts or pictures of them and this completed worksheet to the meeting. Use the back of this page for more space to write.

Describe Artifact 1. Why is this important to you and the school?

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Describe Artifact 2. Why is this important to you and the school?

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Describe Artifact 3. Why is this important to you and the school?

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activity worksheet

## Anything Else...?

Is there anything else you would like the Steering Committee to hear – whether positive or negative? Write down your thoughts.

