

ACTION ITEM

Date: February 24, 2020

To: Members, Board of Education

From: Dr. Kari Cremascoli, Ph.D.,
Superintendent

Subject: Approve the Contract with Consortium for Educational Change (CEC) for Strategic Planning Consulting Services

PROPOSED ACTION BY THE BOARD OF EDUCATION

Motion to approve a contract with the Consortium for Educational Change for Strategic Planning Services in an amount not to exceed \$22,500.

BACKGROUND

Wilmette Public Schools strive to nurture, guide, and challenge students to become creative thinkers, collaborators, and socially responsible, compassionate, and productive citizens of a global society. We provide an environment that supports the academic, social-emotional, and physical well-being of each student by ensuring all staff are highly-qualified and well supported, fostering strong partnerships with parents and the broader community, and balancing educational priorities and fiscal responsibilities to best support our students and community. We are committed to providing a safe and equitable learning environment that fosters a mindset of empathy, respect, and belonging for all District 39 students and staff. Through a broad array of curricular, co-curricular and extra-curricular programming as well as supports, enrichment and services for all, we honor differences, embrace diversity and focus on the growth of each learner as we strive to prepare our students to thrive in an increasingly complex global community. We benefit from a connected and supportive community that places a very high value on education and takes great pride in our public school system as a pillar of our community and leader throughout our region.

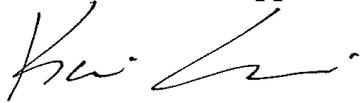
With our most recent annual strategic plans, District 39 updated our core curriculum to meet Common Core State Standards and support growth for students through differentiation and personalization, created flexible learning environments and Learning Commons within each school, implemented 1:1 technology, enhanced Social-Emotional Learning, designed a kindergarten enrichment program, and made improvements to our facilities while maintaining fiscal responsibility. We continue to strengthen our school culture and climate with a focus on relationships, connectedness, inclusion, and engagement to ensure each student and staff member is supported to grow every day.

The Board directed the administrative team to seek a Strategic Planning Facilitator who can help District 39 examine our strengths and opportunities, and facilitate a strategic planning process to define our vision and goals for the next several years. Through this process, the District will define a multi-year plan that will guide the District's pursuit of excellence as we support student growth and achievement, staff development and success, and ongoing facility improvements and maintenance in fiscally responsible ways. We value the input and expertise of our stakeholders (staff, parents, students, and community) and, through this process, aim to actively engage stakeholders as we envision and plan for future improvement efforts. Our goal is to begin the planning process this winter with completion no later than September 2020.

The District received nine responses to requests for information from consulting firms specializing in Strategic Planning. The administrative team met on Monday, February 3rd to review each packet of information and proposal received. Each was evaluated against the identified areas of need, vision and process goals for Strategic Planning. Following a thorough review, three firms were selected to present to the Board and administrative team during interviews on Monday, February 10th. Additional follow-up research was conducted for the top two qualified firms.

The Consortium for Educational Change (CEC) has been selected and is recommended for approval to provide strategic planning consulting services not to exceed \$22,500 in accordance with the attached proposal.

Recommended for approval by the Board of Education,



Kari Cremascoli, Ph.D.
Superintendent of Schools



Strategic Plan Proposal:

Dr. Kari Cremascoli

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Overview of CEC and Strategic Planning Facilitation

The Consortium for Educational Change (CEC) is a non-profit organization that works with the three anchors of a school district (teachers, administrators, school boards) to improve student learning and achievement. CEC was founded in 1987 and currently has more than 80 school districts as members. To become a CEC member district, the superintendent, board president and teachers' union president must all agree to *work together* to improve student learning and achievement.

CEC is committed to transforming educational systems by continuously improving student learning through collaborative, capacity-building services and supports that are made available directly to districts and schools. To this end, CEC offers a wide and diverse range of services.

Any CEC services can be tailored to the needs of the district and can be offered in a variety of combinations to fit local needs. CEC believes in matching the right services to the right local set of needs, so each of its service contracts is unique to a given district or school setting.^{21q}

CEC consultants and trainers are former teachers, principals, superintendents and union leaders who have been successful advancing evidence-based, collaborative change in schools, districts and unions. They all are strong believers in labor-management collaboration and utilize that framework to guide their work with school districts.

In the area of strategic planning, CEC is a leader in the Midwest for conducting school district strategic planning processes. CEC has partnered with more than 25 school districts in Illinois and Missouri to facilitate strategic planning over the past three years. Currently, CEC is engaged with six school districts to complete strategic planning during the 2018-19 school year.

CEC believes strongly in a stakeholder engaged process for strategic planning where the approved plan becomes a guiding document for continuous improvement. The CEC strategic planning process is research based and tailored to fit the school system's unique needs.

This proposal will provide the highest quality strategic planning and stakeholder engagement product from CEC. However, some districts negotiate a lower cost for strategic planning and stakeholder engagement work based upon less support from CEC or reduction of services.

Overview of CEC's Strategic Planning Process

An organization has two choices: Be intentional about the path the organization follows or turn on the organization's autopilot. If you are running your organization without a plan, you are just using the navigation system and not paying attention to how you are moving your organization to a higher level of performance. Strategic planning is not about taking on additional work; it is about taking all those numerous daily decisions and initiatives and making them part of an integrated focus system. CEC's Strategic Planning process ensures that the strategic planning itself a continuous improvement process based on key questions:

1. **Where are we now?** (How would you describe what is working and what needs attention? What are the strengths, weaknesses, opportunities and threats as described by data, information and perceptions?)
 - a. Mission statement
 - b. Data Review
 - c. SWOT (data analysis to identify strengths, weaknesses, opportunities and threats)
2. **Where do we want to be?** (What are your best hopes for the future? What do you want to be different 5-10 years from now compared to what it is currently? What is the preferred future?)
 - a. Vision Statement
 - b. Values statement/commitments
 - c. Sustainable competitive advantage
3. **How will you get from where you are to where you want to be?** (What will everyone do differently to get improved results? What research-based strategies will you implement with fidelity? How will what you do drive your professional development planning and implementation?)
 - a. Long-range Goals
 - b. Suggested Indicators and Measures for each goal
 - c. Critical Strategies
 - d. Strategy Map
4. **What are you learning?** (How will you be certain that your implementation of the research-based strategies are adding value and improving your results? How will you monitor and report your progress?)
 - a. Action plans
 - b. Progress monitoring
 - c. Short-term goals, priorities and initiatives
 - d. Execution

Strategic Plans Developed with CEC as a Partner:

- Are based on the pillars of mission, vision, values/commitments and goals.
- Reflect the values of the organization.
- Define commitments and non-negotiables.
- Set focus and priorities.

- Define the criteria for measuring success.
- Connect initiatives to needs and requirements.
- Define what we ALL need to do well together.
- Inspires action to achieve a big future.
- Guides everyone in daily decision making.

Strategic Plans Developed with CEC as a Partner are embedded in the Strategic Management System developed by the Strategy Management Group's Scorecard Institute. CEC Facilitators of this process have been certified through their process. This system is based on being able to answer two essential questions:

- **Are we doing things RIGHT as an organization?**
- **Are we doing the RIGHT things as an organization?**

The first is operational, the second strategic.

This system further allows an organization to assess the growth and performance aligned to the dimensions of the strategic management system. It further allows the organization to benchmark its performance across districts or central office departments within a district to learn from one another to accelerate action and build capacity.

It recognizes that the return on investment of establishing a strategic plan rests on the organization's ability to execute strategic to get better results.

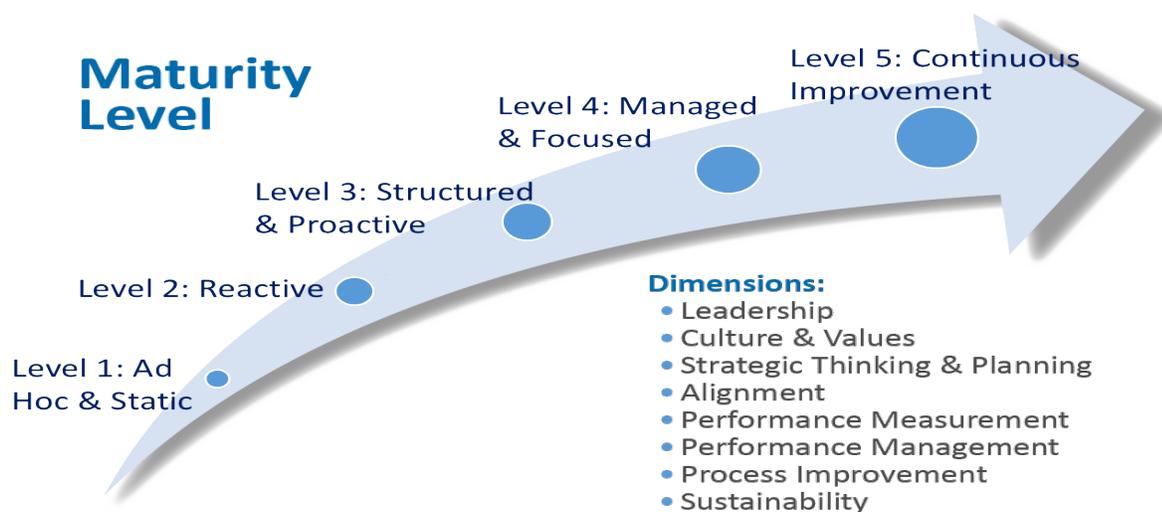
The Strategic Management System is built around five most important factors to successfully execute strategy

1. An **accountability model** must be clearly defined and embraced for each element of the strategy.
2. The organization-wide **strategy must be effectively cascaded down into the business units, support functions, teams and individuals down through the organization.**
3. **Adequate resources (time, budget, skills and capacities)** must be available.
4. Managing change on a consistent and professional basis is vital. **Change management is the primary responsibility of the executive leadership team.**
5. Establishing a **performance culture** is a fundamental requirement for effective implementation and a frequent failure point in many strategic planning and management processes

A Management assessment allows the organization to assess its current performance aligned to the 8 dimensions of the system with five levels of maturity:

- Level 1. Ad Hoc and Static
- Level 2. Reactive
- Level 3. Structured and Proactive
- Level 4. Managed and Focused

Level 5. Continuous Improvement



The eight dimensions listed in the figure above define the components of the management system. Strategic Thinking and Planning are one of the dimensions. **We begin our process by assisting the organization assess its strategic management system.**

Outcomes of the CEC Strategic Planning Process include:

- Enlisting the participation of stakeholder groups - *board of education, certified and support staff, administration, parents, students and community* - to assess the current performance results of the district and envision a preferred future.
- Using data to drive decision-making for continuous improvement.
- Determining gaps between the current performance and the preferred future performance.
- Ensuring a process to bring the plan to life through actions, monitoring, and tracking/reporting progress.

CEC Believes Effective Strategic Plans:

- Reflect stakeholders' voices and needs in the development of system goals.
- Provide indicators and measures to track and report progress on goal attainment.
- Set long and short-term targets for continuous improvement.
- Provide clear direction to align Board, district, site, administrative and staff evaluation goals.
- Provide timely feedback to stakeholders regarding growth and progress.

Most Strategic Planning Simply Does Not Work as Evidenced by the fact that:

- ✓ 95% of a typically workforce does not understand its organization's strategy.
- ✓ 90% of organizations fail to execute strategies successfully.

- ✓ 86% of executive teams spend less than one hour per month discussing strategy.
- ✓ 60% of organizations don't link strategy to budgeting.

These are some of the reasons CEC's Strategic Planning Process Ensures Stakeholder Engagement and Builds in the following Measurement Strategies:

- A **scorecard** measures and manages your strategic plan. It identifies your key performance indicators you need to track and monitor whether you are achieving your mission and vision through long-range goals and critical strategies.
- **Monthly/Quarterly Reviews** check ins allows everyone to report on the status of their action items and make adjustment to their goals if deemed necessary.
- An **annual report** provides to your stakeholders the progress you are making toward achieving your mission and vision.
- **Financial assessment reports** if your progress is value-added and is offering a return on investment.

Living the Plan

While it is important to use a great process to establish an excellent strategic plan, it is more important to be certain the plan becomes the engine that drives improvement and sets forth clear direction for the organization. There are several critical strategies to be certain the plan does not sit on the shelf and collect dust:

- **Align the plan with school improvement plans.** Schools must examine their data aligned to the key indicators and measures of the long-range goals of the district's strategic plan. They must set their own targets. When schools improve, the district improves. Schools must also include implementation of any district strategy action plans.
- **Align with performance evaluation systems:** Be certain that key indicators, measures and targets align with the way the superintendent and his/her cabinet are evaluated. Be certain that key indicators, measures and targets align with the way building leaders are evaluated. Be certain that key indicators, measures and targets align with the way teachers and other certified staff are evaluated.
- **Ensure a research-based action planning process for strategy action plans.** Use a Plan-Do-Study-Act process. Be certain action plans are SMART. Align key action plans with district department leaders and shared decision-making committees. Be certain those impacted by the action plans have opportunities to provide into input to their design and development.
- **Align the plan with important agenda:** The board and administrative team monthly agenda should include an update on strategic plan implementation. Keep the mission and vision at the forefront. It is imperative that everyone in the organization reflects continuously on the mission and vision of the district. Schools must also include implementation of any district strategy action plans. Use values/beliefs and commitments to recruit and hire new employees. Values/beliefs and commitments define expectations for behaviors and actions. They should guide hiring decisions. They should provide periodic reflection opportunities for all stakeholders to remind themselves of what has been identified as core values and commitments.
- **Provide quarterly and annual progress monitoring reports to all stakeholder groups on the both the progress of action plans and the performance of the organization.** Be both progress-monitoring and reporting; keep the plan's focus before its stakeholder groups. It is critical to celebrate accomplishments and identify opportunities for improvement throughout the plan's duration.
- All information in this overview is part of CEC's comprehensive *Strategic Planning Guidebook*.

Proposal Details

CEC realizes that each district is unique and different, therefore the process outlined here is a framework and can be tailored to the individual needs of the school system. The CEC consultant or consultants who would be assigned to this work are nationally trained and certified in strategic planning.

Top Ten Reasons for Using CEC's Strategic Planning Process

Number	Reason
10	One-page plan with supporting documents keeps it "Big and simple."
9	Sets clear focus and priorities. Sets direction for operational action planning.
8	Sets direction for operational action planning. Identifies strategies for improvement.
7	Defines commitments and non-negotiables. Establishes what we all need to do well together.
6	Based on a clear understanding of the data system that provides evidence of what is working and what needs attention.
5	Based on a vision for the future that is reflective of research-based practices.
4	Determines gaps between current performance (where we are) and preferred future performance (where we want to be).
3	Includes stakeholder participation to ensure collaboration and ownership. Provides opportunities for engagement on the part of all interested stakeholders.
2	Defines how we measure success through goals, indicators, measures and targets. The process includes the creation of scorecard management system.
1	Ensures a process that brings the plan to life once approved through alignment with leader and teacher performance evaluations, meeting agenda, and progress monitoring and reporting dashboard system.

Consortium for Educational Change Strategic Planning Process Overview



Steps in the Process	Description
Readiness	The purpose of the Readiness/Introduction Session is to acquaint the district with the strategic planning process. It is essential in alignment with CEC’s mission that the process be a joint endeavor between labor and management and include leaders of the board, union and management. Leaders representative of those groups must attend the introduction session. This session will be facilitated by CEC. Following this session, CEC will finalize a contract and submit it to the district to establish final expectations, roles, responsibilities, costs and timelines.
Orientation	The purpose of the Orientation is to answer the question, “ WHO ARE WE AND WHAT ARE WE BEING ASKED TO DO? ” The Orientation session paints the “The Big Picture” of the strategic planning process so that all strategic planning team members have a shared understanding of the process and their roles and responsibilities in helping the district set clear direction for the future. This is a recommended 90-minute session.
Environmental Scan; Data Retreat; SWOT Analysis	Prior to the Data Retreat, the district conducts an environmental scan to inform stakeholders about the process and inform them how they can be engaged. The scan includes data and information about the perceptions of stakeholders and offers them an opportunity to share their opinions. The purpose of the Data Retreat is to answer the question, “ WHERE ARE WE NOW? ” During this day the strategic planning team will develop a shared understanding of the current situation of the district as identified through data. The outcome of the day is to paint a clear data picture of the district so that the strategic planning team can identify what is working well (STRENGTHS), what is not working well (WEAKNESSES), what are possible areas of need (OPPORTUNITIES), and what are potential impacts (THREATS). This is called a SWOT analysis. This is a recommended six-hour session.
Vision Retreat; Preferred Future Statement	The purpose of the Visioning Retreat is to answer the question, “ WHERE DO WE WANT TO BE? ” During this day the strategic planning team will develop a shared understanding of the current mission, vision, values/beliefs/commitments and goals of the district. The team will review the components of a continuous improvement framework. In addition, it will look at essential information to shape a future vision based on the SWOT analysis from the data retreat. This provides the team with an opportunity to look at best practice research that guides improvement. The outcome of the day is to paint a clear vision of where the district hopes to be in the future. This is a recommended six-hour session.

Setting Direction Retreat; Draft of Plan	The purpose of the Setting Direction Retreat is to answer the question, “ HOW DO WE GET FROM WHERE WE ARE TO WHERE WE WANT TO BE? ” The strategic planning team works to provide a draft of the strategic vision/plan that can be shared with stakeholders to provide opportunities for input and feedback. The team will address long-range goals, preview goal indicators and measures and identify the most urgent strategies that need to be addressed during the plan’s duration to move the district to a higher level of performance. This is a recommended six-hour session.
Refinement/ Recommendations Meeting	The purpose of the Final Meeting of the strategic plan team is to review feedback from stakeholders on the draft of the new plan and make any refinements to the plan before it is presented to the superintendent who will recommend plan approval to the board of education. This is a recommended three-hour session.
Strategy Action Plans	It is recommended that the district use a Plan-Do-Study-Act process to develop strategy action plans. Leaders of the action teams should be trained to ensure the PDSA process is used consistently. Be certain action plans are SMART. Align key action plans with district department leaders and shared decision-making committees. Be certain those impacted by the action plans have opportunities to provide into input to their design and development. Be certain the action plans identify tasks that are research-based and ensure action will be different from what has been done. Doing the same things produce the same results. Recognize the importance of “study” and “act” of the PDSA process.
Plan Approval; Living the Plan	<p>There are several critical strategies to be certain the plan does not sit on the shelf and collect dust: <u>Critical strategies that CEC offers to ensure the return on the investment includes:</u></p> <ol style="list-style-type: none"> 1. <i>Align goals and strategies to a data system (Indicators, Measures, and Targets).</i> 2. <i>Align the data system to a progress monitoring and reporting system for all stakeholders.</i> 3. <i>Align the plan to the work structures and processes to ensure ownership, responsibility and accountability.</i> 4. <i>Align the plan to individual and team performance and program evaluation (goal setting, feedback, reflection, and improvement).</i> 5. <i>Align the plan strategies to PDSA action plans to develop a two-way communication and collaboration system to listen and learn.</i> 6. <i>Align the plan to resources of time and money to ensure focus and priority.</i>

Example Core Plan Team Membership

Stakeholder Group	Number	Who Should Select
Board of Education	1	Board
Superintendent	1	Superintendent
Key members of the Superintendent's Cabinet/Principal Team	2-3	Superintendent
Parent/Community Leadership	2	Board
Union Leadership	1-2	Union(s)

The responsibilities of the core planning team members include:

- Be members of the strategic planning team and assume all responsibilities expected of team members.
- Attend an initial strategic planning meeting to finalize customization of the process for the district.
- Attend virtual meetings (30-40 minutes) one week prior to each meeting of the strategic plan team.
- Make decisions to finalize each agenda for the strategic planning team.
- Provide feedback related to the process to the facilitator(s).
- Attend a final meeting to learn of ways to live the plan. Others may be invited to this meeting.
- Assist the superintendent with the plan presentation to the Board of Education

Example Strategic Plan Team Membership

Stakeholder Group	Number	Who Should Select
Board of Education	2	Board
Superintendent	1	Superintendent
Key members of the Superintendent's Cabinet	2-3	Superintendent
Building Leadership	1 per school depending upon district size	Principals
Union Leadership	1 per organization (Certified staff, Support staff, etc.)	Union(s)
Parent Organization Leadership	1-2 from all Parent Organizations	Parent Council or Superintendent and Board
Family Reps.	1 per school depending upon district size	Parent Teacher Organization
Community Reps.	3-5	Superintendent and Board
School Reps.	1 per school depending on district size	School Leadership Teams
Student Reps. in districts with middle and/or high schools	3-6	Student Council

Note: Core and Plan Team size is different in each school district.

The responsibilities of the strategic planning team members include:

- Attend all meetings of the planning team.
- Learn of roles and responsibilities at an Orientation Meeting.
- Prepare for each meeting by reading materials aligned to each agenda.
- Conduct a data analysis of the district at a Data Retreat by reviewing key data indicators and measures to determine the district's strengths and opportunities for improvement.
- Develop a shared understanding of the needs of stakeholder groups through a review of an environmental scan or stakeholder satisfaction data at a Data Retreat.
- Explore educational, demographic, political, economic, social, and technological impacts on the future of the district at a Vision Retreat.
- Explore research-based, effective practices of high performing districts at a Vision Retreat.
- Review and revise the district's shared mission, vision, values/commitments and goals at a Vision Retreat.
- Provide suggestions for indicators and measures that align to monitoring and reporting district success at a Setting Direction Retreat.
- Identify key strategy gaps that are aligned to the data-based opportunities for improvement through a review of the environment scan and/or system assessment (internal audit)
- Present a draft of the plan for stakeholder review and input.
- Revise and finalize the draft of the plan based on stakeholder review and input.
- Recommend the strategic plan to the superintendent.
- Learn about the responsibilities to live the Plan.

Consortium for Educational Change Stakeholder Engagement Process Overview

A key component of the strategic planning process is to seek formative feedback on the plan team’s work throughout the process. The following outlines a process to engage stakeholders in order to gather feedback during the strategic planning process.

CEC has developed an engagement process that can be modified for the unique needs of a school district. The process allows for co-creation of survey questions and the survey analysis.

This process includes the facilitation of meetings/engagement activities, survey creation and third-party analysis of survey data. CEC believes outside facilitation of the engagement process and the analysis of survey data is a benefit to the district by providing a neutral third-party viewpoint on opinions and data provided by stakeholders. CEC also has found that outside facilitation leads to more open and honest feedback.

Stakeholder Group	Engagement:
Staff: Certified and non-certified	<p>Staff should be informed about the progress of the Strategic Plan team’s work throughout the process and be provided with opportunities to provide feedback on the work of the Strategic Plan Team.</p> <p>This proposal includes opportunities to seek feedback from the certified and non-certified staff.</p> <p>Following the Data Retreat, the District would host two staff forums on separate days to be jointly determined between the district and CEC to gather feedback on the SWOT analysis created by the Strategic Plan Team. These would be held in the afternoon on the same day as the community/parent forums.</p> <p>While the format can be tailored, CEC recommends a structure where the District provides a presentation of information about the school district (similar to the information shared with the Strategic Plan Team during the Data Retreat) and then CEC would conduct a community feedback process.</p> <p>In addition to the feedback sessions, for staff unable to make one of the two forums, a survey would be available made to gather their feedback. The survey would be created by CEC and distributed electronically by the district.</p> <p>Following the Setting Direction Retreat, CEC would create and administer a staff survey to gather feedback on the Draft Strategic Plan. The district would distribute the survey electronically.</p> <p>CEC would summarize all feedback and survey results. That information would be shared with the strategic plan team to help inform the process and ensure that the strategic planning direction was informed by staff.</p>

	<p>The district can choose to utilize the strategic plan team members and district administrators to solicit feedback if the choice is made not to partner with CEC on stakeholder engagement.</p>
<p>Parents/ Community Members</p>	<p>Parents and community members should be informed about the progress of the Strategic Plan team’s work throughout the process and be provided with opportunities to provide feedback on the work of the Strategic Plan Team.</p> <p>This proposal includes opportunities to seek feedback from the parents and community members.</p> <p>Following the Data Retreat, the District would host two community forums on separate days to be jointly determined between the district and CEC to gather feedback on the SWOT analysis created by the Strategic Plan Team. These would be held in the evening on the same day as the staff forums.</p> <p>While the format can be tailored, CEC recommends a structure where the District provides a presentation of information about the school district (similar to the information shared with the Strategic Plan Team during the Data Retreat) and then CEC would conduct a community feedback process.</p> <p>In addition to the feedback sessions, for parents/community members unable to make one of the two forums, a survey would be made available to gather their feedback. The survey would be created by CEC and distributed electronically by the district.</p> <p>Following the Setting Direction Retreat, CEC would create a parent/community survey to gather feedback on the Draft Strategic Plan. The district would distribute the survey electronically.</p> <p>CEC would summarize all survey and feedback results. That information would be shared with the strategic plan team to help inform the process and ensure that the strategic planning direction was informed by staff.</p> <p>The district can choose to utilize the strategic plan team members and district administrators to solicit feedback if the choice is made not to partner with CEC on stakeholder engagement.</p>
<p>Students</p>	<p>Students should be informed about the progress of the Strategic Plan team’s work throughout the process and be provided with opportunities to provide feedback on the work of the Strategic Plan Team.</p> <p>CEC has found that holding focus groups following the SWOT analysis is the best mode to accomplish this feedback from students. CEC can conduct focus groups for an additional charge. It is most cost effective if they are scheduled based upon the community and staff input sessions.</p> <p>Students should be encouraged to participate in the surveys shared with staff, parents and the community.</p>

	CEC would summarize all survey and feedback results and that information would be shared with the strategic plan team to help inform the process and ensure that the strategic planning direction was informed by staff.
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As part of this proposal, CEC will advise the district in the development of a strategic plan website area to be housed on the district's website. All strategic plan information, data, team meetings, team resources and team products are housed on the site. It serves as a wonderful resource for both the plan team and for those not on the team to locate strategic plan information. After the plan is approved, the site becomes the progress monitoring and reporting site.

Please visit this site as an example of this feature:

While it is the district's responsibility to send invitations, promotional materials, complete handouts and provide communications promoting the engagement activities, as part of this proposal CEC will consult on those activities and provide examples of best practices in those areas.

Districts that have perception data readily available can create an environmental scan. Districts that do not have perception data available will typically conduct surveys of staff, parents and/or community. CEC will assist the district in the creation of the plan as part of the proposal. CEC can create the environmental scan for an additional charge.

Example Schedule

The schedule outlined below is a **DRAFT**. Exact dates for activities will be set as soon as possible after an agreement is signed. The schedule is customizable and will be based upon the needs of the district and the CEC consultants working with the district on this project.

Tentative Dates	Activity	Key Group
June-July 2018	Core Plan Team meeting to review proposal, discuss Strategic Plan Team selection, plan logistics, finalize meeting dates and times	Core Plan Team
June-Aug. 2018	Environmental Scan	District Administration
July 2018	Prepare for Orientation Meeting and Data Retreat.	Core Plan Team
Aug. 2018	Hold Orientation Meeting to review strategic planning process and roles, responsibilities, and commitments.	Strategic Planning Team
Early Sept. 2018	Hold Data Retreat to review System Assessment feedback (if implemented), the environmental scan, and to conduct SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats).	Strategic Planning Team
Sept. 2018	Hold Stakeholder Engagement Sessions with stakeholders and CEC helps facilitate the meeting and provides analysis of the feedback.	Administration with CEC
Mid-Oct. 2018	Hold Vision Retreat to draft preferred future statement (mission, vision, values, commitments, goals).	Strategic Planning Team
Nov. 2018	Hold Setting Direction Retreat and draft strategic plan and long-range goals.	Strategic Planning Team
Nov.-Dec. 2018	Share draft of strategic plan with stakeholders.	Administration with CEC
Dec. 2018-Jan. 2019	Hold Refinement/ Recommendations Meeting and review feedback in order to make final strategic plan decisions.	Strategic Planning Team
Jan. 2019	Board of Education considers approval of the Strategic Plan.	Board of Education
Feb.-April 2019	Action Plans are developed by strategy action teams with CEC guidance. District can choose to do this on its own.	Strategy Action Teams with CEC
April-June 2019	District leaders or designees draft first year annual action plans; District leaders or designees consider "Living the Plan" strategies; District leaders or designees consider communication and roll-out plans. District can choose to do this on its own.	Administration with CEC

CEC Strategic Plan/Stakeholder Engagement Deliverables

One Page Strategic Plan:

- Mission and Vision
- Core Values/Commitments
- Long-Range SMART Goals
- High-Leverage Strategies
- Strategy Map

Strategic Plan Guidebook:

- Supporting documents from the Strategic Plan Team's work to serve as a resource during plan implementation. (SWOT Analysis and Preferred Future Statement; Rationale for long-range goals and selected strategies; Suggested scorecard indicators; Key concepts for Action Planning)

Stakeholder Engagement Results:

- All feedback data from stakeholder engagement sessions and surveys
- Third-party analysis of all feedback data
- Summaries of feedback data for use by the Strategic Plan Team and District

Living the Plan Training and Guidebook:

- Scorecard Management System
- Alignment to School Improvement
- Alignment to Leader and Teacher Performance (PERA and Student Growth)
- Alignment to Key Meeting Agenda
- Alignment to Budget
- Progress Monitoring and Reporting

Examples:

<https://www.glenview34.org/strategic-plan>

<https://www.d155.org/about/strategic-plan/district-scorecard>

Readiness for Strategic Planning Cost Proposal

Event	Description/Time	Charge/Cost
Preparing the system for strategic planning	<ul style="list-style-type: none"> • Meeting with leadership to review the process, roles and responsibilities • Considerations in selecting the Core Team • Considerations in selecting the Plan Team • Reviewing the current data system: goals, indicators, measures, targets • Preparing the system for sharing the data system with the plan team and other stakeholders • Preparing the system for using the data to set next year school improvement goals • Meeting with Data Report leaders • Coaching Data Report Leaders • Considering the environmental scan 	Three half days - \$1250 each
TOTAL 3 half days - \$3,750 includes travel expenses		

Strategic Planning Cost Proposal

Event	Description/Time	Charge/Cost
Orientation Meeting with Strategic Plan Team	Preparation and Meeting with Strategic Plan Team. Provide clarity on process, dates, timelines, roles and responsibilities 90-minute meeting	Half day -\$1250
Data Retreat with Strategic Plan Team	Preparation and Meeting with Strategic Plan Team. Conduct Data Retreat resulting in a SWOT analysis 6-hour meeting	Full day - \$2500
Data Retreat Findings	CEC writes the Data Retreat findings and share ideas for collecting stakeholder feedback (off site)	Half day - \$1250 Off site
Vision Retreat with Strategic Plan Team	Preparation and Meeting with Strategic Plan Team. Conduct Vision Retreat resulting in a Preferred Future Statement 6-hour meeting	Full day - \$2500
Vision Retreat Findings	CEC writes the Vision Retreat Findings and share ideas for collecting stakeholder feedback (off site)	Half day - \$1250 Off site
Setting Direction Retreat with Strategic Plan Team	Preparation and Meeting with Strategic Plan Team. Conduct Setting Direction Retreat resulting in the first draft of the Strategic Plan 6-hour meeting	Full day - \$2500

First Draft of Strategic Plan	CEC writes the Setting Direction Retreat Findings and share ideas for collecting stakeholder feedback (off site)	Half day - \$1250 Off site
Refinement and Recommendation Meeting with Strategic Plan Team	Preparation and Meeting with Strategic Plan Team to review feedback and make final recommendations for the Strategic Plan 3-hour meeting	Half day - \$1250
Final Strategic Plan	Finalize the Strategic Plan and Strategic Plan Guidebook 4 hours (off site)	Half day - \$1250 Off site
Presentation to District Leaders	Provide Resource Guide for “Living the Plan” Review strategies for “Living the Plan” with alignment to: <ul style="list-style-type: none"> • School improvement plans • Leader and teacher evaluation • Scorecard/dashboard data system • Board and admin team agendas • Monitoring and Reporting • Action plan progress • District performance 4-hour meeting	Half day - \$1250
TOTAL 6 days - \$15,000 includes travel. The District would provide the basic materials and supplies for these events which typically includes-charts, chart paper, handouts, post-it notes, etc.		

Action Planning **Optional and Customizable** Cost Proposal

Event	Description/Time	Charge/Cost
Action Planning	<ul style="list-style-type: none"> • Training Goal Champions and Co-Leaders of Strategy Action Plan in the Plan-Do-Study-Act Process to facilitate action teams for each strategy of the strategic plan. • Coach Co-Leaders virtually • Provide feedback on action plans off site 	Three half days - \$1250 each
TOTAL 3 half days - \$3750 includes travel		

Scorecard Development and Progress Monitoring and Reporting Optional and Customizable Cost Proposal

Event	Description/Time	Charge/Cost
Scorecard Development, Progress Monitoring and Reporting	<ul style="list-style-type: none"> Training Co-Leaders of Strategy Action Plan in progress monitoring and reporting system Establish Progress Monitoring Cycle Establish Reporting Cycle Draft District Scorecard 	Three half days - \$1250 each
TOTAL		
3 days - \$3,750		

This proposal will provide the highest quality strategic planning and stakeholder engagement product from CEC. However, some districts negotiate a lower cost for strategic planning and stakeholder engagement work based upon less support from CEC or reduction of services. In addition, some districts have chosen to just complete the strategic planning process without stakeholder engagement, action planning or living the plan to lower the cost.

Recent References

Arlington Heights District 25	Lori Bein	Superintendent	lbein@sd25.org
Avoca District 37	Kaine Osburne	Superintendent	kosburne@avoca37.org
Belvidere District 100	Dan Woestman	Superintendent	dwoestman@district100.com
CCSD 21 (Wheeling)	Michael Connolly	Superintendent	Michael.connolly@ccsd21.org
CCSD 59 (Elk Grove Village)	Art Fessler	Superintendent	Fessler.art@ccsd59.org
Crystal Lake School District 47	Kathy Hinz	Superintendent	khinz@d47.org
Community HSD 155	Steve Olson	Superintendent	solson@d155.org
Glenview District 34	Dane Delli	Superintendent	ddelli@glenview34.org
Hinsdale District 86	Tamara Prentiss	Superintendent	tprentis@hinsdale86.org
Francis Howell School District	Mary Hendricks-Harris	Superintendent	mary.hendricks-harris@fhdschools.org
LaGrange District 106	Amy Warke	Superintendent	awarke@district106.net
Northbrook District 28	Larry Hewitt	Superintendent	lhewitt@northbrook28.net
River Forest District 90	Ed Condon	Superintendent	econdon@district90.org
Rockford District 205	Ehren Jarrett	Superintendent	ehren.jarrett@rsp205.com