

Strategic Planning  
Facilitation Proposal  
Regional School District 17



**HYA** | HAZARD  
YOUNG  
ATTEA  
ASSOCIATES

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# RESEARCH-BASED, COLLABORATIVE STRATEGIC PLANNING



## IMPACTING STUDENT OUTCOMES FOR OVER THREE DECADES

For 35 years, Hazard, Young, Attea, and Associates has partnered with school districts to chart a future course through strategic planning, strategic plan implementation, and leadership development.

HYA serves school systems across the nation, large and small, urban and rural, with Associates located across the country to conveniently serve clients with a local focus and national reach and expertise. Simply stated, HYA has a long-standing track record of working collaboratively with school districts to create research-based strategic plans that impact student outcomes. Moreover, HYA's approach is rooted in the field of education, and processes are facilitated by life-long educators rather than a system of strategic planning developed for business or the non-profit sector that has been adapted for schools.

## A DISCIPLINED, PROVEN PROCESS

Our proven research-based approach allows school systems to engage all stakeholders, build a consensus around what matters most, and channel resources accordingly to ensure a maximum return on investments. As a result of the HYA process and methods of approach, we co-create a well-researched, thorough, and thoughtful strategic plan informed with inclusive input from internal and external stakeholders. School districts across the county have found that our plans are not those that gather dust in binders or sit on shelves for years; instead, they are a shared call to action that drives initiatives, resource allocation, and strategies.

"Our new strategic plan has given us purpose and a viable direction. Thanks to the amazing work of the HYA team, our school district is now walking within its purpose and moving toward success."

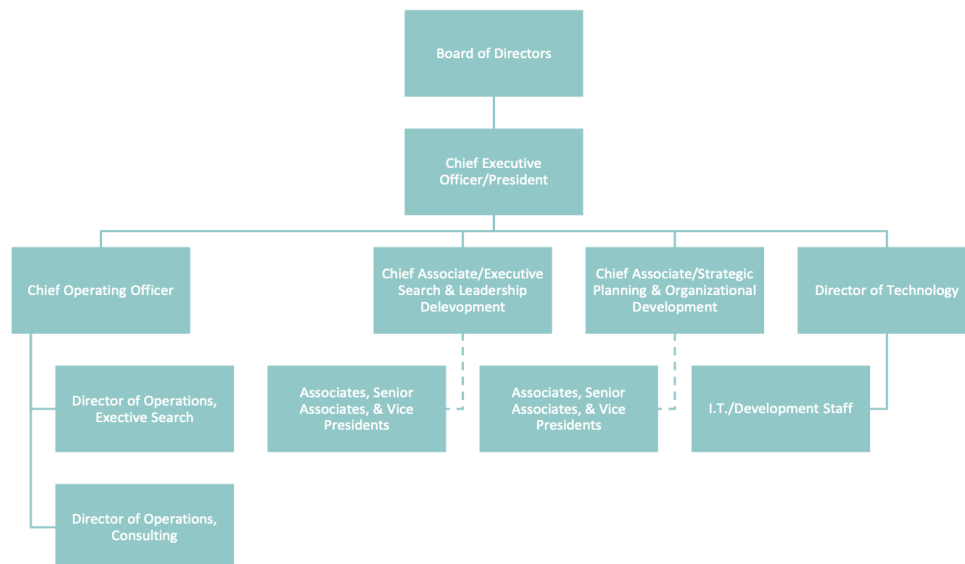
- Dr. Mabel Alfred, Superintendent, Matteson District 159

# DESCRIPTION OF THE FIRM

Hazard, Young, Attea, and Associates (HYA) is an educational consulting firm with a central office near Chicago, Illinois, and consultants located across the nation. HYA's network of highly experienced educational consultants has made it the preeminent education consulting firm with over 30 years of experience with executive search, strategic planning, and a variety of other services to support school districts. Since 1987, HYA has provided support for education leaders to employ school executives, address student performance issues, and support aspects of school district operations.

All strategic planning work is directed by the Chief Associate for the Strategic Planning Collaborative with oversight from the CEO/President. A full office and technical staff are available to consultants and school districts for support.

**Hazard, Young, & Atta Organizational Chart**



**HAZARD, YOUNG, ATTEA & ASSOCIATES**

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Why is HYA exceptional amongst the variety of firms that provide strategic planning services? We believe it is due to the following factors:

### **DEEP ROOTS IN THE EDUCATIONAL COMMUNITY**

For 35 years, Hazard, Young, Attea, and Associates have partnered with school districts to chart a future course. The foundation of HYA is the expertise and quality of the firm's national network of associates. Presently, HYA is represented by nearly 100 associates across the United States who assist with the firm's mission to help school leaders improve student outcomes through proactive, thorough, and quality assistance in strategic planning, leadership, and analytics.

### **EDUCATIONAL EXPERTISE AND EXPERIENCE**

HYA Associates are education leaders who have decades of service in public schools and as faculty at universities and colleges. Many associates are former public school superintendents who understand the unique challenges of working collaboratively with internal and external stakeholders to align the work of the district to create significant improvements in student outcomes. As experienced educators, HYA Associates deeply understand effective practices and trends, including strategies for college and career readiness, online learning, and effective technology integration.

### **COLLABORATIVE APPROACH**

Our associates are educators and understand from experience that collaboration with school boards and leadership teams is essential to successful planning. As a result of the HYA process and methods of approach, we co-create a well-researched, thorough, and thoughtful strategic plan informed with inclusive input from internal and external stakeholders. As a result of our collaborative approach, our strategic plans are a call to action. Their progress is readily and regularly shared with the Board and community. Most importantly, they make a positive, tangible difference to students, staff, and families.

### **STRATEGIC DASHBOARD**

HYA provides ongoing use of a strategic dashboard that is made available on a district's website. The Strategic Dashboard provides a public-facing method to tell the district's story and to provide a common school improvement language that increases community engagement by tracking progress on strategic goals in a visually appealing and easy to understand format. (Description attached to this proposal.)

### **EXECUTIVE OVERSIGHT, TECHNICAL SUPPORT & FULLY STAFFED OFFICE:**

Each strategic plan project is overseen by the Lead Associate for the HYA Strategic Plan Collaborative and the HYA president to ensure that no detail is overlooked. Each project is also assigned a project manager and technical support personnel who are available to support HYA Associates and District leaders. HYA has professionally staffed offices, technological infrastructure, and full time employed staff; thus, HYA is capable of delivering solutions for each phase of strategic planning,

**Our Processes are Focused on Research-Based Best Practices, yet are Customized to Fit District Needs and Local Conditions**

# PROCESS OVERVIEW

A disciplined strategic planning process allows school systems to engage stakeholders, build a consensus around what matters, and channel resources accordingly to ensure a maximum return on investments. The proposed process includes three concrete phases resulting in a clear and concise plan to improve student outcomes and performance of schools.

Improving educational outcomes, experiences, and opportunities for students, staff, and the community starts with a clear and compelling district mission and vision that resonates with stakeholders and inspires the organization and the individual schools within it to action. HYA's method of approach as outlined below begins by reviewing and updating current mission, vision, and belief/core value statements so that they will inspire and engage stakeholders, focus decisions regarding prioritization of resources, and provide an aligned framework for leadership and governance at the Board, district office, and school levels.

## Phase I: ENGAGE



During the Engage Phase, a variety of perception data is gathered through focus groups and individual interviews. To ensure maximum participation, a research-based survey is deployed to gather opinions from various stakeholder groups. A full report of all data collected during the Engage Phase is created and presented to the district.

## Phase II: FOCUS



The findings from the Engage Phase are reviewed along with past plans and data. A Mission, Vision, Portrait of a Graduate, Strategic Priorities and Goals are drafted, discussed, and revised until a final plan is agreed upon. Strategic goals arise from data collected during the Engage Phase and allow internal and external stakeholders to feel connected to the Strategic Plan.

## Phase III: IMPLEMENT & EVALUATE



An online Strategic Dashboard is created, which can be embedded onto the District website to communicate the plan and progress to the community. Leaders are trained to update the dashboard. There is no charge for continued use of the dashboard from year to year.

# SCOPE OF SERVICES

## **HYA shall provide the following services and deliverables:**

### **Phase I: INCLUSIVE ENGAGEMENT**

The engage phase will focus on engaging a wide variety of stakeholders and collecting the necessary qualitative and quantitative data to document the district's current state relative to its desired future state. A kick-off/process planning meeting will be critical in developing a specific schedule and designing the district's customized process.

At the District's request, any portion of the Engage phase services may be conducted virtually to accommodate local conditions at the time of service. Typically all focus groups are held in person and interviews are conducted via phone or virtual meeting. HYA Associates have access to Zoom and Google Meets and will not need access to District Technology

### **Phase I Services**

- Conduct a Planning Meeting with the School Board, Superintendent, and cabinet members. This planning meeting ensures that the School Board and district leadership are integral in providing input, support, and commitment. At this meeting, the school board can determine whether they wish to be directly involved in the strategic plan process or, alternatively, to appoint a strategic plan committee.
- Provide a summary of the planning meeting, which details the desired outcomes, timeline, steps of the strategic planning process, and decisions made by the School Board.
- Support and facilitation for district leaders or strategic planning committee to gather and organize a review of current information about the district and records of performance, including a review of website documents including department home pages, budget information, and other related documents and information including student achievement.
- Provision of a written communication guide and support to staff to ensure that internal and external stakeholders receive continuous information about the process and progress of strategic planning. Consultants will work closely with district leaders to develop communication plans to ensure the proportional representation and input of stakeholder groups, including challenging to reach and marginalized populations. This guide includes drafts of invitation letters and social media posts for interviews, focus groups, and community forums and drafts of notices and social media posts for stakeholders regarding the online survey.
- Implementation of a qualitative data collection plan that includes 32 sessions facilitated by HYA Associates. Sessions include:
  - Superintendent, individual School Board member, and cabinet member interviews. This step ensures that the unique voices of key stakeholders are heard.



- Focus groups to engage stakeholder populations (including district and site leadership teams, faculty, staff, parents, community members, community leaders, and students). The consultants will work closely with district staff to identify focus group participants. These focus groups can occur virtually using HYA or the district's technology to ensure participation in the current pandemic environment.
- Individual phone interviews with key community leaders identified during the planning meeting.
- Implementation of a quantitative data collection plan:
  - Gather perceptions of community constituents electronically using an online survey fully hosted and executed by HYA. Consultants will work with district staff to distribute the survey through links on their website, social media, and emails. The survey includes four sections: current state of the district, quality of programming, strategic plan priorities, and equity. Survey data is thoroughly analyzed by HYA associates and reported in an easy to digest research-based format yet.
  - Review of relevant data, including student achievement data, school operations data, and School Improvement Plans.
  - Review of the current strategic plan to ensure alignment with the plan created in this process.

## Phase I Deliverables

- *Community Engagement for Strategic Planning Report* (Slide deck & written report). This report includes both an overview and specific information gathered from district data and document reviews, environmental scan, focus groups, interviews, and surveys. The report will provide the basis for updating the mission, vision, core values, strategic priorities & goals, and the portrait of a graduate.
- *Community Engagement for Strategic Planning Report* will be delivered and discussed at a Board of Education meeting or strategic planning committee meeting. Delivery and discussion with the Superintendent and cabinet before the board meeting will be provided at the Superintendent's request.
- *Needs Assessment* developed from the review of district data and current strategic plan.

## Phase II: COLLABORATIVE FOCUS

The focus phase will leverage the information collected from the engage phase. It will shape clear vision and mission statements, guiding principles, strategic goals, objectives, and the portrait of a graduate. The focus phase will predominately include the School Board or Strategic Planning Committee with Superintendent and cabinet. Quantitative and qualitative data from the Engage phase are used as the basis of discussions and decision making in the Focus phase. At the District's request, any portion of services in the Engage phase may be conducted virtually to accommodate local conditions at the time of service.

## Phase II Services

- Facilitation of School Board or strategic planning committee session to review and discuss *Community Engagement for Strategic Planning Report*, which summarizes all information gathered during the Engage phase. This report will be arranged into the broad priority areas as indicated by the data.

- Facilitation of up to three School Board or strategic planning committee sessions to develop strategic plan components:
  - Mission
  - Vision
  - Core beliefs
  - Strategic priority areas
  - Strategic goals and objectives
  - Measurable key performance-based indicators/metrics.
  - Portrait of a graduate
- Associates will create and present a preliminary report and recommendations. School Board or strategic planning committee sessions will be used to review the report and fine-tune strategic plan drafts until a final plan is created.
- Support for district leaders and/or strategic planning committee on communication regarding the strategic planning process with internal and external stakeholders with special attention given to strategies for difficult to reach populations.
- HYA Associates facilitate meeting with the school board and superintendent’s cabinet to collaboratively develop Mission, Vision, and Belief statements informed by data gathered during the Engage Phase.

## Phase II Deliverables

- *Strategic Plan Document* to serve as a framework to guide the direction for the district. The strategic plan will contain:
  - Mission
  - Vision
  - Core beliefs
  - Strategic priority areas
  - Strategic goals and objectives
  - Measurable key performance-based indicators/metrics
  - Portrait of a graduate

All strategic goals will be developed in consideration of the data gathered from internal and external stakeholders. The *Strategic Plan Document* will begin as a draft and will be developed throughout the focus phase.

## Phase III: IMPLEMENT, EVALUATE, & COMMUNICATE PROGRESS

This phase predominately includes district and school leaders with support from HYA Consultants to ensure timely implementation and ongoing evaluation of the Strategic Plan using the HYA Strategic Plan Dashboard, which will be housed on the District website for easy reference by all internal and external stakeholders.

## Phase III Services



- Facilitation of up to two planning meetings with the leadership team to guide implementation planning and delivery.
- Provision of templates and guidance to further refine action plans, metrics, timelines, roles, and responsibilities.
- Provision of the Strategic Dashboard will be housed on the district website so that the district can publicly tell its story and monitor adherence and progress towards realizing its strategic plan.
- Train district leaders in the use and upkeep of the Strategic Dashboard.

### **Phase III Deliverables**

- Final Strategic Plan report and presentation to the School Board
- Strategic Dashboard housed on the district website for plan implementation and evaluation. A strategic dashboard is a powerful tool for boards of education to govern the implementation of the district's strategic plan and to evaluate the impact and return on investment that strategic goals are having on the student, financial, and other system outcomes. A well-designed strategic dashboard provides a framework for the Superintendent to align communication, school improvement, student data, and other district processes. The Strategic Dashboard provides a public-facing method to tell the district's story and to provide a common school improvement language that increases community engagement by:
  - Tracking progress on strategic goals in a visually appealing and easy to understand format,
  - Establishing national, state, and peer group comparisons,
  - Tracking demographic, economic, and other contextual conditions of the community
  - Monitoring the degree to which the school district is executing tactics and action plans.

### **Phase III Optional Services**

The following optional services will be presented in greater detail during the IMPLEMENT & EVALUATE Phase and, if selected, codified under a separate contract. Research and experience tell us that ongoing engagement throughout the plan translates to more significant improvement in student outcomes. Associates stand ready to serve the district in a variety of processes, including:

- Ongoing professional development for administrators on further developing action plans, metrics, timelines, and data monitoring.
- Ongoing professional development for teachers regarding strategies called for in the strategic plan.
- Ongoing work to engage the community in the understanding of district initiatives.

# PROJECT TIMELINE

HYA commits to the collaborative development of a timeline with the Board and Superintendent or designee. Most plans can be completed within three months, depending on the Board or strategic plan committee's work schedule. The timeline below is an example only:

## Engage Phase

- Planning meeting – March 2021
- Interviews – March & April 2021
- Focus groups – April & May 2021
- Community survey – April & May 2021
- Data review – April & May 2021

## Focus Phase

- Presentation of Engage Phase findings – June 2021
- Work with board or strategic plan committee to bring the plan through a series of drafts – June & July 2021
- Presentation of the final plan for board approval – August 2021

## Implement, Evaluate & Communicate Phase

- Strategic Dashboard constructed and accessible on the district website – August 2021
- Continued work to support leadership team with implementation – August & September 2021

# PROJECT PERSONNEL

The HYA team reflects a key distinguishing difference – the combination of deeply experienced educational practitioners and researchers with nationwide reach. Dr. Timothy J. Purnell will be the primary facilitator of the strategic planning process. His work will be supported by Dr. Laurie Kimbrel, Chief Associate for the HYA Strategic Planning Collaborative. HYA Associates work collaboratively with district personnel but take primary responsibility for all data collection in the Engage Phase, formulation of drafts and final strategic plan in the Focus Phase, and meeting facilitation in all phases of work. HYA Associates ensure all processes proceed on the agreed-upon timeline.

## **Dr. Timothy J. Purnell, HYA Associate**



Dr. Purnell is an entrepreneurial leader, board member, and strategic planner. Tim has a proven track record of spearheading transformational initiatives and building businesses for global expansion. As an executive, Tim utilizes multiple-lens diagnostics, forecasting, fiscal accountability, employee satisfaction, leadership development, and goal-oriented productivity to achieve rational growth and expansion. He led a 27% increase in revenue over three years and expansion of operations to Asia as the CEO of the American Montessori Society. Tim holds a doctorate in leadership from Seton Hall University, where he was named a 2019 Many Are One award recipient for service leadership. He is an internationally-recognized speaker on topics such as leadership, trauma, ethics and mental health. As superintendent of the Somerville public school district in New Jersey, Tim oversaw a \$44 million budget, educational services, personnel management, and stakeholder communications for district schools. He implemented the first, district-wide, trauma-sensitive initiatives in the state of New Jersey and was one of 100 educators invited to President Obama’s 2014 ConnectED Initiative. In 2016, he was named National Superintendent of the Year and was recognized as a Highest Rated Professor in the Nation for his class on mental health.

## **Dr. Laurie Kimbrel, Chief Associate for the HYA Strategic Planning Collaborative**



Dr. Kimbrel is a professor of Education Leadership at the University Georgia System. She teaches courses in the school leadership masters and specialist programs and the doctorate program of school improvement. Her research in teaching and learning and school leadership is widely published in scholarly journals and practitioner-focused periodicals. She regularly presents to regional, national, and international audiences regarding studies of effective teacher and administrator selection processes, community engagement, and school effectiveness.

Before her higher education role, she had a 27-year career in K-12 public schools where she served in various positions, including classroom teacher, dean of students, assistant principal, principal, associate superintendent, and Superintendent for seven years. She has worked as a public educator in Illinois, California, and Georgia. Dr. Kimbrel has extensive school and district level experience in curriculum and instruction, human resources, policy development, community relations, and school operations. In addition to her public school positions, she has served as president of several state organizations, including the High School District Association of California and Schools for Sound Finance in California. Dr. Kimbrel regularly works with school districts to develop strategic plans, community engagement plans and support continuous, research-based school improvement efforts. As a published quantitative and qualitative researcher and educational practitioner, Dr. Kimbrel is uniquely qualified to work with school districts to develop and implement strategic plans.

# EXPERIENCE/REFERENCES

## SELECTED REFERENCES

HYA has facilitated successful Strategic Planning processes with large and small districts in urban, suburban, and rural settings. The selected references listed below were chosen because of their similarity to Regional School District 17 in size, student profile, or community type. Additional references are available upon request.

### **Montgomery Township School District, Skillman NJ**

Contact: Nancy Gartenberg, Former Superintendent

[nancy.gartenberg@gmail.com](mailto:nancy.gartenberg@gmail.com)

Link to Strategic Dashboard:

<https://www.montgomeryschoolsmd.org/campaigns/Strategic-Planning-FY19-22/>

### **Hiawatha Community School District 426, Kirkland, IL**

Contact: Jared Poynter, Superintendent

Phone: 815-522-6676

[jared.poynter@d426.org](mailto:jared.poynter@d426.org)

Link to Strategic Plan:

[Hiawatha School District Strategic Plan](#)

### **Harvey School District 152, Harvey, IL**

Contact: Mr. John Thomas, Superintendent

[jthomas@harvey152.org](mailto:jthomas@harvey152.org)

Phone: 708 333-0300

Link to Strategic Plan:

[Harvey 152 Strategic Plan](#)

(This district does not use the dashboard)

### **Laurens County School District 55, Laurens, SC**

Contact: Edward Murray Director of Administrative Services

[ermurray@laurens55.org](mailto:ermurray@laurens55.org)

Office: 864-984-8102

Cell: 864-766-9190

Link to Strategic Plan:

<https://www.laurens55.org/strategic-plan-7d610bae>

(This district does not use the dashboard)

# PRICING

## STRATEGIC PLAN PRICING

In consideration for Services, the district will pay to Hazard, Young, Attea, and Associates:

- A. The "not to exceed" Consulting Fee for the facilitation of the strategic planning process (Phases I, II, & III) in the amount of \$20,500 This fee is all-inclusive and includes all project elements, including meeting facilitation, document preparation, and associate travel. It will be due in three installments:
  - 50% will be invoiced upon execution of the contract/agreement
  - 25% will be invoiced upon presentation of the *Community Engagement for Strategic Planning Report*
  - 25% will be invoiced upon completion of the strategic plan
- B. Additional on-site visits beyond what is specified in each phase will be billed at \$2,000 per Consultant per day (e.g., additional focus groups and additional working days with the Board).
- C. The Strategic Planning Surveys are available in English and Spanish and can be translated into additional languages at \$315 per language.
- D. Printing and Postage; HYA is a green corporation whereby all documents related to strategic planning will be provided via a secure electronic portal hosted on the HYA website. If the School Committee wishes to have hard copies, the district will be billed for expenses to cover the costs associated with printing, binding, and shipping all materials.

PHASE I: Engage-----	\$10,500
Includes all services and deliverables listed in the proposal under Engage Phase.	
PHASE II: Focus-----	\$6,000
Includes all services and deliverables listed in the proposal under Focus Phase.	
PHASE III: Execute-----	\$3,500
Includes all services and deliverables listed in the proposal under Execute Phase.	
 Total for Strategic Plan	 \$20,500





### USE CASES

- Governance
- Strategic monitoring
- Benchmarking
- Community relations
- Transparency

### INTENDED USERS

- Boards of Education
- Superintendent
- Cabinet
- Community

## Overview

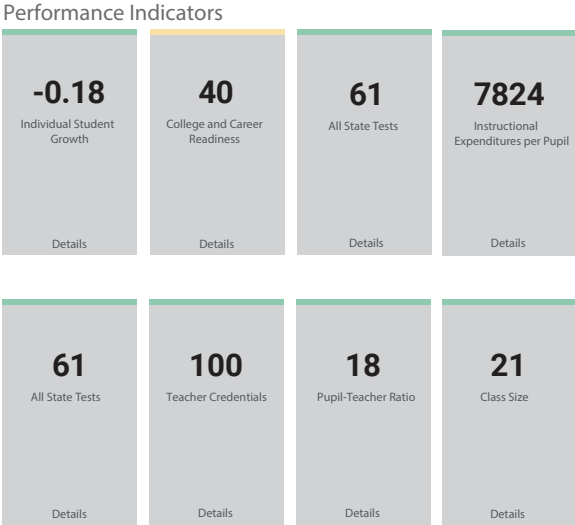
A strategic dashboard is a powerful tool for boards of education to govern implementation of the district's strategic plan and to evaluate the impact and return on investment that strategic goals are having on student, financial, and other system outcomes. In addition, a well-designed strategic dashboard provides a framework for the superintendent to align communication, school improvement, student data, and other district processes.

## Feature Highlights

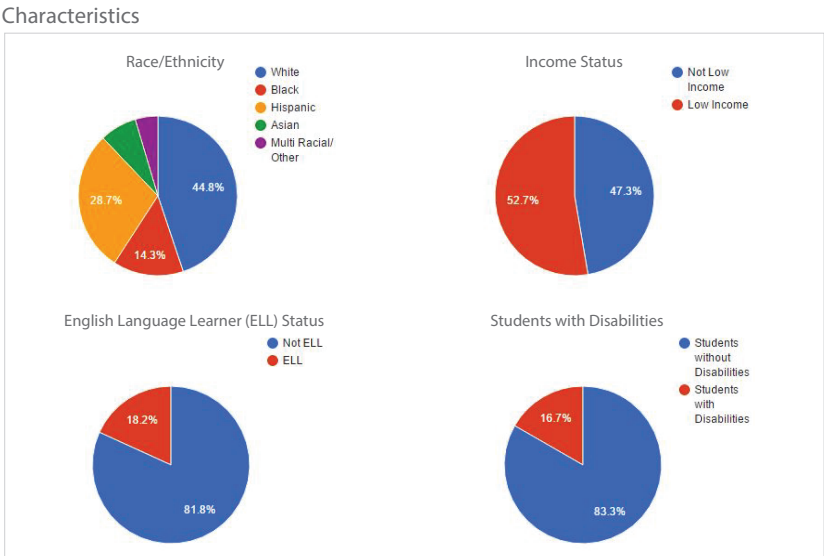
- Establish performance indicators and benchmarks to monitor progress toward strategic goals
- Establish national, state, and peer group comparisons
- Track demographic, economic, and other contextual conditions of the community
- Monitor the degree to which the school district is executing tactics and action plans

[ecragroup.com](http://ecragroup.com)

Establish performance indicators and benchmarks to monitor progress toward strategic goals



Track demographic, economic, and other contextual conditions of the community



Monitor the degree to which the school district is executing tactics and action plans

