



CEC's Strategic Planning Process & Timeline		
<p>Planning</p>	<p>CEC/District Planning Session</p> <ul style="list-style-type: none"> Review Prospecting slide deck with District Lead Collaboratively map out the plan for the work Identify district preparedness for Readiness Sessions Consultant plan for the work <ul style="list-style-type: none"> Build Shared Google folder Customize and send Strategic Planning Pre-Support Survey Customize Readiness slide decks and handouts Final check in with district prior to Readiness Session <ul style="list-style-type: none"> Shared Folder structure Solidify district/CEC role in next two meetings (facilitation, materials, etc.) 	<p>Half Day</p> <p><i>2 Hours for District Collaboration</i></p> <p><i>2 Hours for Consultant Prep</i></p>
<p>Phase One <i>(2-4 Weeks Later)</i></p>	<p>Readiness Session 1</p> <ul style="list-style-type: none"> Core Team reviews slide deck overview of process, expectations of team members Discuss: <ul style="list-style-type: none"> Strategic Planning team composition, communication, and timelines Meeting preparedness and responsibilities of Core Team 	<p>Half Day</p> <p><i>Half day on-site</i></p>
<p>Phase Two <i>(No less than three weeks between each retreat to allow for the creation of and stakeholder feedback collection on artifacts)</i></p>	<p>Readiness Session 2</p> <ul style="list-style-type: none"> Core team reviews slide deck overview of Environmental Scan Data preparation for Data Retreat Individual support sessions with each of the three district office presenters of District data 	<p>Half Day</p> <p><i>Half day on-site</i></p>
	<p>Orientation</p> <ul style="list-style-type: none"> Overview of the strategic planning process Expectations of strategic planning team members Discuss homework for setting the stage. Review current plan and exemplar plan 	<p>Half Day</p> <p><i>2 hours VIRTUAL</i></p>
	<p>Data Retreat (An additional half-day work time for the facilitator)</p> <ul style="list-style-type: none"> Identify team member perception data points. Examine stakeholder perception data. Analyze data presented during district data presentations. Build a SWOT analysis to identity current reality 	<p>Full Day</p> <p><i>6 hours In-Person</i></p>
	<p>Vision Retreat (An additional half-day work time for the facilitator)</p> <ul style="list-style-type: none"> Review stakeholder feedback and edit SWOT/ Examine foundations of a Preferred Future Statement Identify team members hopes, dreams, and aspirations for district in the 	<p>Full Day</p> <p><i>6 hours In-Person</i></p>



CATALYST FOR EDUCATIONAL CHANGE

	<p>future</p> <ul style="list-style-type: none"> ● Discuss homework articles on visioning ● Review and discuss the Battelle questions to refine a vision. ● Develop a Preferred Future Statement: <ul style="list-style-type: none"> ○ mission, vision, motto, and core values ○ student, adult, and system portraits 	
	<p>Setting the Direction Retreat (An additional half-day work time for the facilitator)</p> <ul style="list-style-type: none"> ● Review stakeholder feedback on PFS ● Develop draft strategic plan: <ul style="list-style-type: none"> ○ Determine long-range goals language and description. ○ Discuss and identify options for KPIs. ○ Identify most urgent strategies for each goal (no more than ten) ○ Review, discuss, and refine strategies 	<p>Full Day</p> <p><i>6 hours In-Person</i></p>
	<p>Final Plan Review</p> <ul style="list-style-type: none"> ● Last meeting of full Strategic Planning team ● Review stakeholder feedback from Draft Strategic Plan ● Discuss and edit draft plan ● Come to consensus on draft plan for recommendation to superintendent 	<p>Half Day</p> <p><i>2 hours Report Writing</i></p> <p><i>2 Hours VIRTUAL</i></p>
<p>Phase Three</p>	<p>Living the Plan</p> <ul style="list-style-type: none"> ● For Core Team and/or identified champions for Living the Plan ● Review Living the Plan Overview slide deck ● Discuss ways to integrate current and new efforts ● Consultant prep documents for getting started support ● Consultant work with district team to begin identifying methods and processes for monitoring and supporting the strategic plan ● Consultant customize and share the Post-Support Survey 	<p>2 Half Days</p> <p><i>2 hours Overview</i></p> <p><i>2 hours Consultant Prep</i></p> <p><i>1 Half Day Getting Started Support</i></p>



Environmental Scan

"Environmental Scanning" is a business practice used to help leaders survey the landscape of competitors, customers, and innovations. It can also include a review of economic, social, and judicial changes impacting business practice. Environmental scanning provides districts with insight into the opportunities that will make a difference in the lives they lead and in those who come into contact with the organization. **What are the ideas and perceptions of stakeholders and influencers, as well as the trends at the local, state, national, and international levels, that can shape the future of the organization?**

There are key questions about the future that will assist the Strategic Plan team to receive some initial input and feedback from the stakeholders they represent as well as trends in education.

Scan source material can include:

1. The perceptions of stakeholders: students, families, staff, and community.
2. Workplace, careers, and global trends.
3. Shifts in the educational profession and impacts that are making a difference as we look to improve both teaching and learning.
4. The benchmarking of performance compared to other similar districts.

Environmental Scanning is most effective when it becomes a part of the culture or "mind-set" of the organization. The value of feedback and expert participation as well as staff participation is formalized in a "read and review" process. Such a process supports the mindset orientation of Environmental Scanning as a decentralized and legitimate activity within the organizational climate. Environmental Scanning is continuous, systematic alertness to the external environment in a way that helps build an understanding of what sort of future the educational community wishes to create.

CEC offers districts several ideas on the collection of Environmental Scan data prior to the Strategic Planning effort. Opportunities include virtual and non-virtual approaches to data and information collection to assist the Strategic Plan team prepare for its work. Environmental Scan data reminds the Strategic Plan team of their role to bring forward their ideas and represent those not on the team. Communities appreciate the value that environmental scan efforts add to the strategic planning process.



Orientation

Essential Questions

Who is in the room and what are we charged to do? What are the roles and responsibilities of the Plan team? What does each of us bring to the table? What is a Strategic Plan? What are the elements of a Strategic Plan team process?

Outcomes: The Orientation is an opportunity for the Strategic Plan team to learn about the scope of the Strategic Planning process.

Strategic Plan team members will:

- Meet the Strategic Plan team
- Learn about the Strategic Plan process
- Review about the roles and responsibilities of the Strategic Plan team
- Review the roles and responsibilities of the Core team
- Learn about the Strategic Plan that has been in existence for the past several years
- Preview another district's Strategic Plan

Time Allocation/Format

Two hours total: Face-to-face or virtual. The process includes collaborative activities to discuss homework articles, explore the Plan process, review a high-quality Plan, and understand the current Plan status in the district.

Product

The Orientation Meeting paints the "Picture" of the Strategic Planning process so that all team members have a shared understanding of the process and their roles and responsibilities in helping the district set a clear direction for the future.

District Responsibilities

- Follow the designated process to select members of both the Strategic Plan and Core teams.
- Select homework articles to set the stage for Strategic Planning roles and responsibilities
- Prepare a short report summarizing the state of the current Strategic Plan.
- Ensure that all Plan team members understand the importance of attending all team meetings.



Data Retreat

Essential Questions

Where are we now? How would you describe what is working and what needs attention in the past and present? What are the strengths, weaknesses, opportunities, and threats as described by data, information, and perceptions? What does the data picture look like today?

Outcomes: The Data Retreat provides an opportunity for the Strategic Plan team to review and reflect on key data.

Key data sources include:

- Results of the Environmental Scan/System Assessment
- Academic/Achievement/Learning data
- Human Resource/Personnel data
- Learning Environment data
- Social/Emotional Student data
- Demographic data (student and community)
- Financial data (district)
- Satisfaction/Climate data (student, family, staff, community) such as the 5Essentials

Note: Trend, comparative, and cohort data are optimal, when possible.

Time Allocation/Format

Six hours total: Face-to-face or virtual. (If virtual, the agenda will be divided into three 2-hour sessions.) The process includes collaborative activities to analyze and synthesize Perception Data and Evidence-based Data (District Reports) and draft a SWOT.

Product

The Data Retreat allows the Strategic Plan Team to know strengths, weaknesses, opportunities, and threats, and capture baseline data so a new vision can be established. The SWOT describes the current state of the district and answers the question, ***“Where are we now?”***

The SWOT is then shared with stakeholder groups between the Data Retreat and the Vision Retreat to solicit feedback. The feedback is reviewed at the next meeting of the team.

District Responsibilities

- Assist CEC with collecting and organizing the feedback from stakeholders for the Plan team review of the Environmental Scan data.
- Organize and present 40-minute data reports:
 - Academic Data: Student growth and achievement,
 - Learning and Working Environment: Culture and climate, and
 - Resources: Financial, Facilities, and Technology.



Stakeholder Engagement (Required - CEC Or District Provides)

Essential Questions

Do internal and external stakeholders believe we are on the right track? What do you think about the Draft SWOT analysis?

Outcomes: Stakeholder engagement segments, immediately following the Data and Setting Direction Retreats, provide an opportunity to gather feedback so the Strategic Plan Team can further reflect on their work and ensure they are on the right track in representing the beliefs and feelings of the internal and external communities.

Feedback opportunities include:

- Staff engagement sessions
- Parent and community engagement sessions
- Student focus groups
- Specially designed surveys to gather feedback from internal and external stakeholders
- Neutral third-party survey analyses

Time Allocation for Engagement Sessions

CEC provides a number of options for districts to choose from related to both virtual and face-to-face engagement sessions. Face-to-face or virtual stakeholder engagement session events are typically 4-6 hours total with each individual stakeholder group session lasting no more than 90 minutes. Districts typically offer three (students, staff, and parents) back-to-back sessions during a single-day event. Schedules usually start with a student session in the afternoon, which is followed by a staff session that takes place after school. The community-wide session typically runs in the early evening. Depending on the size of the district and the scope of the outreach, sessions can be held at multiple schools over multiple days. A survey is also offered for those unable to make engagement sessions.

Product

The Data Retreat's SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) is shared with stakeholders for feedback. That feedback is later reviewed by the Core team and used to revise the Plan team SWOT.

District Responsibilities

- Promote the Stakeholder engagement sessions and surveys.
- Review the reports prior to being shared with the public to ensure accurate representation of findings.



Vision Retreat

Essential Questions

Do internal and external stakeholders believe we are on the right track as a Strategic Plan team? Where do we want to be? What are our best hopes for the future? How do we want to be different in 5 years? What is the preferred future?

Outcomes: The Vision Retreat provides an opportunity for the Strategic Plan team to invent the future by identifying how the district will look, feel, and sound different several years ahead.

Strategic Plan team members will:

- Review stakeholder engagement results and refine the SWOT from the Data Retreat
- Revisit the current Strategic Plan to reflect on the mission, vision, and core values/commitments.
- Develop a shared understanding of a continuous improvement framework and the research-based effective practices of a high performing organization.
- Examine the impact of future mandates and legislation.
- Investigate student agency, career choice readiness, engagement, ownership, and learning outcomes.
- Draft a Preferred Future Statement that describes how the district will be different at the end of the Strategic Plan's life

Time Allocation

Six hours total: Face-to-face or virtual. (If virtual, the agenda will be divided into three 2-hour sessions.) The process includes collaborative activities to revise the SWOT from the Data Retreat based on stakeholder engagement results and the revisiting of the Mission, Vision, and Core Values; explore the Future for Learning and Teaching; and draft a Preferred Future Statement.

Product

The Vision Retreat allows the Strategic Plan Team to revisit the Draft mission, vision, and values, which focuses on culture and relationships. The Preferred Future Statement describes the future state of the district and answers the question, "**Where do we want to be?**"

The Preferred Future Statement can then be shared with stakeholder groups between the Vision Retreat and the Setting Direction Retreat to solicit feedback. The feedback is reviewed at the next meeting of the team.

District Responsibilities

- Assist CEC with the collection and organization of feedback from stakeholders for the Plan team review of the SWOT analysis.
- Assist CEC with the organization and selection of resources for the Strategic Plan team to investigate innovation, change theory, creativity, and research-based practices.
- Assist CEC to develop an understanding of the current mission, vision, and values of the organization.



Setting Direction Retreat

Essential Questions

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 everyone implement with fidelity? How will what we do drive professional development planning and implementation? How will what we do drive the use of district resources?

Outcomes: The Setting Direction Retreat provides an opportunity for the Strategic Plan team to make decisions related to goals, high-leverage strategies, and priorities.

Strategic Plan team members will:

- Review the Preferred Future Statement and make any refinements.
- Examine current long-range goals.
- Establish future long-range goals.
- Preview Key Performance Indicators for current long-range goals.
- Provide input into Key Performance Indicators for future long-range goals.
- Identify high-leverage strategies to focus district work for the duration of the Plan.
- Prioritize high leverage strategies.
- Align high leverage strategies to the future long-range goals

Time Allocation/Format

Six hours total: Face-to-face or virtual. (If virtual, the agenda will be divided into three 2-hour sessions.) The process includes collaborative activities to review the Preferred Future Statement and affirm the Long-Range Goals; provide input to Key Performance Indicators and measures for each goal; and identify aligned critical strategies for action.

Product

The Setting Direction Retreat allows the Strategic Plan Team to identify and prioritize critical goals and strategies to move the district closer to achieving its mission and vision. The Strategic Plan Draft provides a first look at the new, evolving Strategic Plan and answers the question, ***“What will we do to move us from where we are to where we need to be to achieve our mission and vision?”***

The Strategic Plan Draft is then shared with stakeholder groups between the Setting Direction Retreat and the Final Meeting of the Plan team to solicit feedback. The feedback is reviewed at the last meeting of the team.

District Responsibilities

- Assist CEC with the collection and organization of the feedback from stakeholders for the Plan team review of the Preferred Future Statement.
- Assist CEC with the first draft of Key Performance Indicators.
- Ensure that any major projects that are currently unfinished are incorporated into the discussion of high-leverage strategies.



Final Meeting Of Strategic Plan Team

Essential Questions:

What final changes need to be made in the Plan to reflect patterns of stakeholder feedback? What will make the Plan better? What will make the Plan clearer? What changes should be made that are supported by data and evidence?

Outcomes: The Final Meeting of the Strategic Plan team is an opportunity to make any refinements to the draft of the Plan before it is given to the Superintendent who will recommend Plan approval to the Board of Education.

Strategic Plan team members will:

- Examine feedback from numerous stakeholder group members, including staff, parents, community, Board, management, union, parent organizations, and students
- Make final refinements, additions, or deletions to the Draft Plan
- Ready the Plan for the Superintendent to present to the Board of Education for approval

Time Allocation/Format

Two hours: Face-to-face or virtual. The process includes collaborative activities to review stakeholder input and make final adjustments to the Strategic Plan. These will result in feedback by the Strategic Plan team to CEC in preparation for a final recommendation to be approved by the Board of Education.

Product

The Final Meeting of the Strategic Plan team allows the team to reflect on stakeholder feedback to make additions, deletions, or refinements to the Draft Plan. This meeting answers the question, ***“What if any changes need to be made in the Strategic Plan Draft to improve the recommendation?”***

The Strategic Plan is then submitted to the Board of Education for approval by the Superintendent. The Strategic Plan team is invited to attend the Board meeting.

District Responsibilities

- Assist CEC with the collection and organization of the feedback from stakeholders for the Strategic Plan team review of the Draft Plan.



Supplemental Information

Stakeholder Engagement is Unique to the CEC Process

A key component of the Strategic Planning process involves continually going back to constituent groups for reactions to the Strategic Plan team's work. This helps to ensure that the work is truly representative of the perspectives of all groups concerned. It also encourages stakeholder ownership in the planning process and ensures there will be little surprise when the recommendations are finalized. At three points in the process, the Strategic Plan team decides, with the assistance of the Facilitator, how to solicit stakeholder feedback:

- Between the Data Retreat and the Vision Retreat (required)
- Between the Vision Retreat and the Setting Direction Retreat (optional)
- After the development of the one-page draft Strategic Plan (required)

The Strategic Plan team's work from each Retreat will be captured by the Facilitator, who will produce a summary document that will be shared with constituent groups for reaction and feedback. By design, each Strategic Plan team retreat is a month apart from the previous Retreat, allowing team members a minimum of two weeks to gather and submit feedback to the Site Coordinator. The Site Coordinator and Facilitator will organize the feedback and determine the method for reporting to the Strategic Plan team at its next Retreat. This component can be enhanced with an additional partnership with CEC where the stakeholder engagement support is expanded.

There are several options for seeking feedback and input within this proposal. Those options can be expanded with an additional partnership element:

- **Partner with CEC to create and conduct Stakeholder Engagement Surveys:** See detailed information on the overview sheet about stakeholder engagement and surveys provided by CEC.

In addition, if the decision is made not to utilize CEC for community engagement:

- **Staff (Administrators, Teachers, and School Support Personnel):** Another option is to seek feedback at a staff meeting. This provides a captive audience and ensures more participation in the feedback process. The staff would have an opportunity to review the documents at the end of each Strategic Plan team meeting and to provide feedback and input through post-it notes, Gallery Walk, Plus/Delta, posters, etc. Other options for staff could include a survey. Additionally, grade level/department teams could review the documents and solicit input at a team session designed for this purpose.
- **Board members:** Board of Education representatives on the Strategic Plan team should take the products from each meeting back to a Board meeting for feedback and response. It is imperative that Board members have input along the way rather than wait until the end as the Board has the responsibility to approve the Plan.
- **Parents and Community:** These stakeholders can participate in a variety of parent and community organization meetings, specially scheduled parent and community Single Topic Forums. Surveys represent another method for collecting input.
- **Students:** Middle and high school students can provide feedback through surveys and forum opportunities.



Selecting the Strategic Plan Team

**1/3 Staff 1/3 Parent and Community 1/3 Management
+ Students**

Stakeholder Group	Number	Suggested Selection
Board of Education	2	Board of Education
Superintendent	1	Superintendent
Key members of the Superintendent’s Cabinet	2-3	Superintendent
Building Leadership	2-3 per level: elementary, middle, high	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 Representatives	1 per school or, depending on district size; 3-4 from elementary, 3-4 from middle, and 3-4 from high school	Parent Teacher Organization
Community Representatives	3-5	Superintendent and Board
School Representatives	1 per school or, depending on district size; 3-4 from elementary, 3-4 from middle, and 3-4 from high school	School Leadership teams
Student Representatives in K-12 districts	6-8	Student Council

The responsibilities of the 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.
- 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.
- Set long-range goals and identify high leverage strategies that define what priorities need attention to move the district to a higher level of performance.
- 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.



Selecting the Core Team

Stakeholder Group	Number	Suggested Selection
Board of Education	1	Board of Education
Superintendent	1	Superintendent
Key member of the Superintendent's Cabinet	1	Superintendent
Building Leadership	1	Principals
Staff Leadership	1	Staff
Parent Organization Leadership	1	Parent Council or Superintendent and Board

The responsibilities of the Core team members include:

- Serve as 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.
- 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.)



EXAMPLE OF A SWOT ANALYSIS FROM THE DATA RETREAT

STRENGTHS: What do we consider to be our strengths? What advantages do we have? What do others say our strengths are?

- Financial stability
- Staff- highly qualified and dedicated
- Technology
- Restoring programs that were lost due to budget reductions
- Increasing high school graduation rate
- Pride
- Safety
- Middle and High School extra-curricular activities; clubs
- Dual Language, STEM, Running Start program choices
- New leadership

WEAKNESSES: What do we consider to be our weaknesses? What are we most criticized for or receive the most complaints about? What do we seem to have a hard time doing well?

- Trust/morale
- Communication
- Collaboration
- Shared decision-making; input
- Alignment of assessment and differentiated instruction to newly established K-12 curriculum
- Student Achievement Gaps; underperforming schools
- Intervention and enrichment systems
- AP tests--scores or 3 or higher
- Low test scores
- Inconsistent procedures and practices
- Low-income programs and services
- Student engagement
- Professional development
- Parent involvement
- Aging facilities

OPPORTUNITIES: What opportunities for improvement do we know about, but have not addressed? Where with a little work could we change a weakness into a strength?

- Student-centered, personalized learning
- Preparation for life/"Whole child"
- Social/emotional curriculum and supports
- Data systems for progress monitoring and reporting
- Customer service
- Math supports
- Staffing diversity
- Labor-management relationships
- Program evaluation
- Time, schedule, day, extended day, year, summer
- Debt management

THREATS: Who or what threatens us the most? What challenges are coming that we must respond to? What might block our progress?

- State finance
- Student changing demographics
- ESSA
- Pension reform
- Prospective employee pool
- Student enrollment
- Community growth
- Social media; social issues



Top Ten Reasons for Using CEC's Strategic Planning Process

Number	Reason
10	Delivers a one-page Plan with supporting documents by keeping it “big and simple.”
9	Sets clear focus and priorities.
8	Identifies strategies for improvement and sets the direction for operational action planning.
7	Defines commitments and non-negotiables. Establishes what we all need to do well together.
6	Builds a clear understanding of the data system that provides evidence of what is working and what needs attention.
5	Establishes 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.
2	Defines how we measure success through goals, indicators, measures, and targets.
1	Ensures a sustainable process that brings the Plan to life, once approved, through alignment with leader and teacher performance evaluations, action planning, meeting agendas, and progress monitoring and reporting dashboard system processes.



Most Recent References for Strategic Planning

Superintendent	District	Email Contact
Eric Melbye	Bloomington Public Schools Bloomington, Minnesota	emelbye@isd271.org
Brian Waterman	Lyons Township District 204	bwaterman@d204.lths.net
Michael Amadei	Des Plaines School District 62	hertelp@d62.org
Lori Bein	Arlington Heights District 25	
Daniel Sullivan	Berkeley School District 87	dsullivan@d87.org
Daniel Booth	Carbondale Elementary School District 95	dbooth@ces95.org
Kari Cremascoli	Wilmette District 33	cremasck@wilmette39.org
Martha Tyan-Toye	Riverside District 96	Ryan-toyem@district96.org
Michael Connolly	Community Consolidated School District 21	michael.connolly@ccsd21.org
Tamara Prentiss	Hinsdale Township High School District 86	tprentis@hinsdale86.org
Michael Greenlee	North Boone Community Unit School District 200	mgreenlee@nbcusd.org
Larry Hewitt	Northbrook School District 28	lhewitt@northbrook28.net
Ed Condon	River Forest School District 90	condone@district90.org