



# Strategic Planning Buy-In Through Community Engagement

December 2019





# SchermCo

# The Team



Natalie Hall  
Design Principal



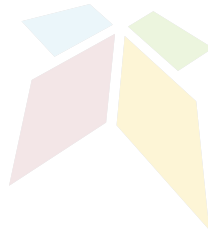
Drew Schantz  
Design Principal



Andrea Goetchius  
Associate Partner



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# SchermCo Team



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Founder & Principal



Kelsey Van Dyke  
Director of Programs



Lori Schermbeck  
Director of Operations



Ana Cunningham  
Project Associate



Jake House  
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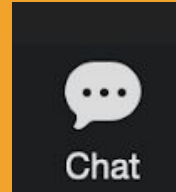


Katie Schermbeck  
Design Associate

NAME

DISTRICT, ROLE

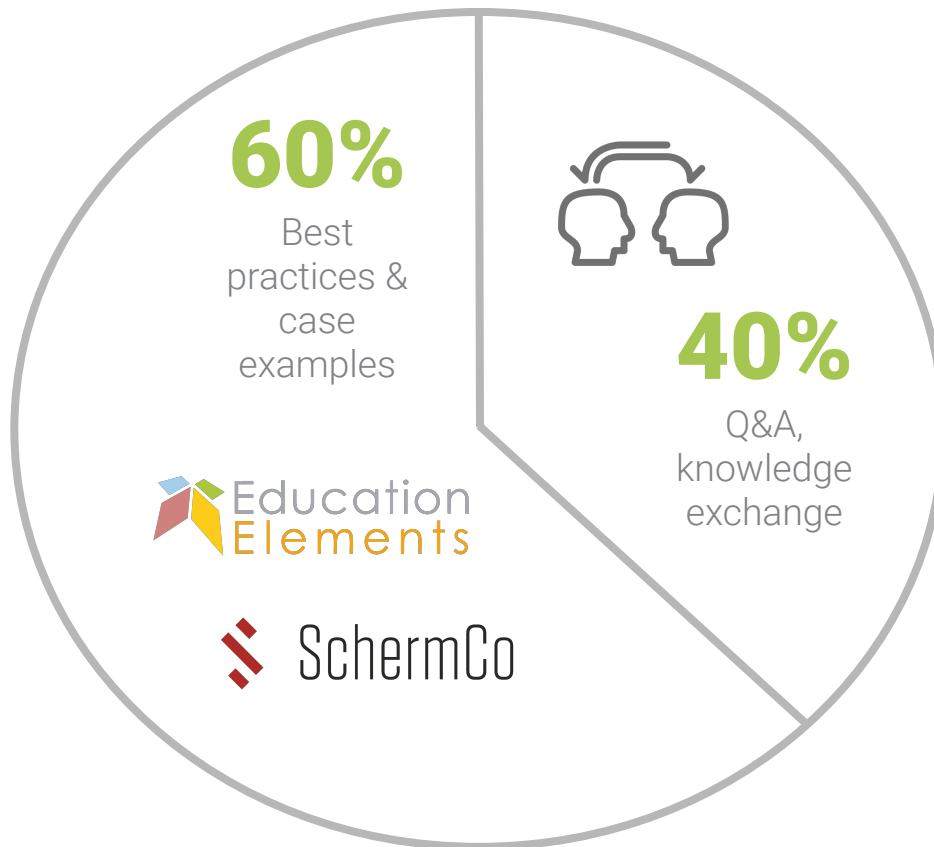
WHY I'M HERE



*PUT YOUR  
ANSWER IN  
THE CHAT!*



# How we'll spend our time



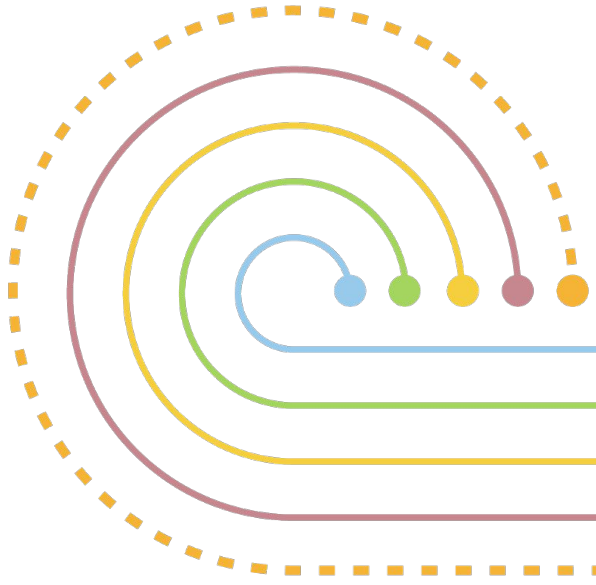


# Education Elements



How do you write a strategic plan so that it becomes a living, breathing resource?





## Responsive Classrooms

We help schools and districts design and implement engaging, relevant, student-centered classrooms to meet the needs of all students.

Consulting services include:

- + Personalized and Blended Learning
- + Competency-Based Education
- + New School Design

## Responsive Leaders

We help district leaders, school leaders, coaches, and teacher leaders deepen their knowledge and skills in core innovative leadership competencies.

Consulting services include:

- + Innovative Leadership Competencies: District Leader, School Leader, Coach, and Teacher Leader
- + 100 Day Plan
- + Executive Coaching

## Responsive Teams

We help districts build better teams and implement habits for strong team collaboration, decision-making, meetings, and projects in order to achieve their goals.

Consulting services include:

- + New School Rules
- + New Team Habits
- + Teacher Retention

## Responsive Organizations

We help districts build and implement inclusive, responsive, and effective systems and structures to better serve their students and communities.

Consulting services include:

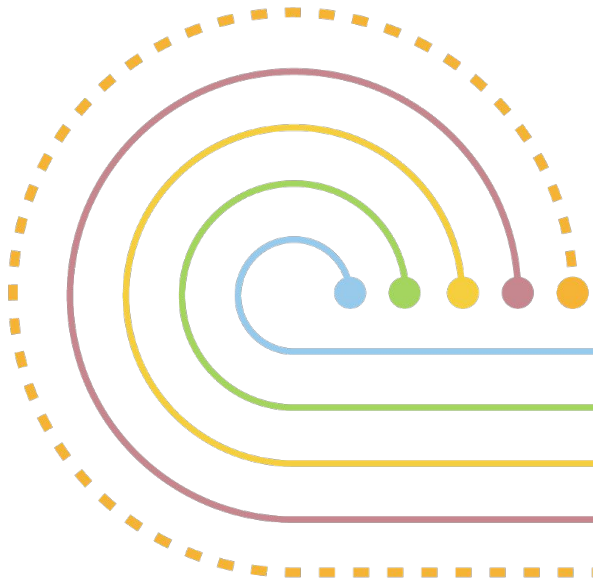
- + Strategic Planning
- + Culture of Innovation
- + New School Rules

## Responsive Tools

We help schools and districts design and use tools in a way that is aligned with their priorities and the specific needs and goals of their stakeholders.

Consulting services include:

- + Curriculum Adoption
- + Technology Rollout
- + Onpoint
- + Touchpoint
- + Personalized Learning Toolkit
- + Responsive Org Playbook
- + The NEW School Rules book
- + The NEW Team Habits book



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*Strategic Planning Process  
Stakeholders Involved  
Governance + Decision Making*

**HOW** we engage in **strategic planning**  
matters just as much as  
**WHAT** is included in the strategic plan.

*Vision + Mission  
Core Values  
Focus Areas + Initiatives*

# Our Responsive Strategic Planning Approach



## PHASE

### Plan & Align

#### Key Objectives

- We know how, when, and to what extent we will engage stakeholders in the planning process

#### Key Outputs

- Planning process (e.g. calendar)
- Stakeholder engagement matrix
- Planning teams list

### Foundations

- We collect data to highlight our strengths and opportunities
- We create a draft vision that guides our work

- Summarize findings + data review
- Draft vision statement + areas of focus

### Design

- We use a designer's mindset to think critically about when to flare and when to focus
- We prioritize areas that support our vision and design solutions for those areas

- Planning canvas with priority areas
- Strategic plan outline

### Launch & Monitor

- We codify not only the plan but also how we will "pivot" when needed
- We inform groups not already involved

- Implementation plan + timeline
- Final strategic plan + board presentation
- Plan for progress monitoring

# Education Elements **Case Example**

We lead with a Design Thinking and iterative mindset.

Plan + Align

Determine how district will **work together and engage stakeholders**

Foundations

Identify **opportunities for improvement and focus areas**

Design

Prototype **solutions and develop priorities**

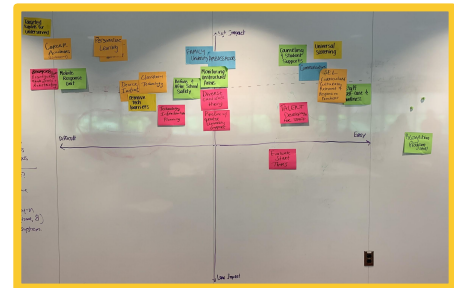
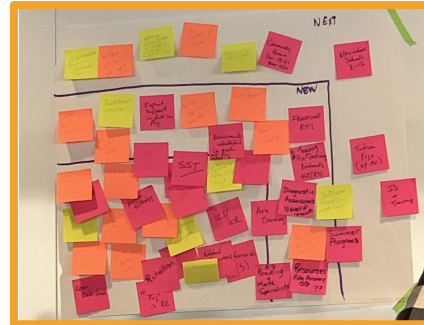
Launch

Take steps to **launch initiatives and build accountability systems**

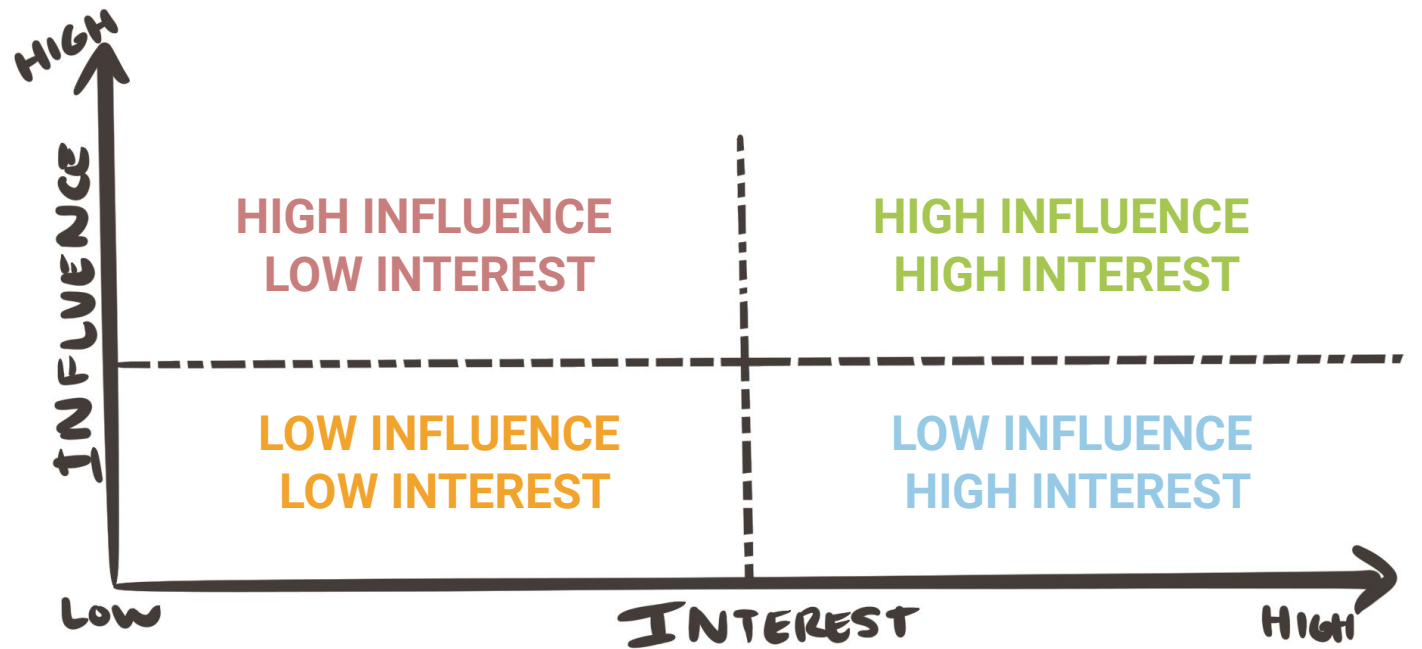
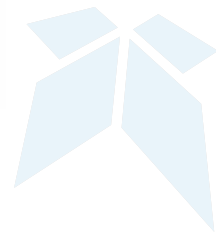
Provide tools and resources to facilitate ideation from multiple voices - not just the ones in the room.



Help teams organize the (often messy) process of prototyping and prioritizing solutions.



# Engagement Matrix



Source: Gartner

# Engaging Stakeholders In Decision-Making



By: **Andrea Goetichius** on September 4th, 2019

Print/Save as PDF



## Three Steps to Selecting Your Superhero Strategic Planning Team

LEADERS | SCHOOL DISTRICTS

"One bag of peanut butter M&Ms, please." It's the first step I take as I enter a movie theater before selecting the perfect middle-center seat – a ritual I began with my mom as a child. On this day, instead of rushing to the front of the line, I took a moment to look around. There was a buzz in the room as kids and adults of all ages lined up to see the first black superhero. There is no doubt that [Black Panther was a major milestone](#) for the United States and the world. Throngs of people viewed the film multiple times, relishing the opportunity to be represented in such an empowering way. A couple of years later I noticed a similar sense of pride at the release of Captain Marvel, a film featuring a female superhero. I knew the Avengers was a well-regarded team but it was clear that these additions were crucial. It's difficult to imagine a complete team with the most recent additions because of the unique perspectives they bring. It is the first step in a longer commitment to inclusion and empowerment.

## CREATING STRATEGIC PLANNING TEAMS

More often than not, when kicking off a strategic planning endeavor, everyone wants to be involved. Education Elements works with dedicated staff in committed communities with courageous ideas of how to best prepare our students for the future. Since we know how critical it is to accurately represent the needs and values of your community while also ensuring you have a lean decision-making body, we provide guidance for how to involve all who are invested in the outcome of your plan.

At Education Elements, we believe that [Planning for Change Not Perfecting](#) should be the driving mantra of strategic planning. It is crucial to evaluate the people you need to engage in order to have a richly representative plan that responds to the fundamental needs of your community.

**WHO** you engage and **HOW** you engage people says more about your values than your plan ever will.

To develop a responsive plan, we recommend incorporating all stakeholders into a feedback loop. This feedback loop serves to generate ideas, present proposals and catalyze change. Teams engaged with this loop are also encouraged to collaborate actively and dynamically. Another way to understand this loop and the people within it is to see them as 'layers'. Below, we offer potential names for teams; we recommend leaders adapt these titles as they see fit.

### PROJECT TEAM

ALTERNATE NAMES: Project Leads, Logistics Team

#### PURPOSE

Drive completion of work. This team synthesizes and edits the process and plan throughout. These individuals are part of the Steering Team and have additional responsibilities between steering team meetings.

#### CONSIDERATIONS

- No more than 4 people (including organizational leader).
- Have significant time and resources to dedicate to strategic planning process.
- Highly organized and detail-oriented.
- High comfort facilitating large groups.

### PLANNING TEAM(S)

ALTERNATE NAMES: Design Teams, Working Groups, Specialist Teams, Department Councils

#### PURPOSE

This leadership group will play an important role in engaging stakeholders, communicating the strategic plan, giving and receiving feedback. Individuals in this group might be divided into teams based on topics, priorities or interests to engage this community and reach more stakeholders. This group will guide and drive strategic planning and make the first line of decisions that will be validated by the steering team.

#### CONSIDERATIONS

- No more than 25-50 people.
- This team will be crucial to creating and recommending priorities or initiatives within the plan.



### STEERING TEAM

ALTERNATE NAMES: Core Team, District Council

#### PURPOSE

Decision-making body made up of representatives of your district. It is inclusive of different backgrounds, roles, and tenures. This team's role is to synthesize and deliver the action items outlined in your strategic plan. Throughout the creation of this plan, this team will be tasked with oversight of the process to ensure it aligns with the needs of various stakeholders.

#### CONSIDERATIONS

- No more than 15 people.
- This team should represent multiple stakeholders: parents, community leaders, school leaders, district staff, teachers.
- Consider inviting a board member to join your team.

### ADVISORS

ALTERNATE NAMES: Consultative Teams, Focus Groups

#### PURPOSE

This group of people will serve in a consultative capacity. They will help inform the strategic planning process in order for the planning and steering teams to make representative decisions. This group is more dynamic than the other teams; a district might bring different individuals into the process as needed. The time commitment would be less than the other groups.

#### CONSIDERATIONS

- Number of participants will vary.
- This group will provide context, perspective, feedback and ideas.

**A note on taking a stance for equity, inclusion, and justice:** We believe that the first step to building a plan that uplifts all students is to understand that at their cores, most systems have been designed to uplift some, not all. Our school districts are not an exception to the truth and it is incumbent upon those who work in our districts to change this reality. Grounding ourselves in this understanding allows us to build plans that dismantle long-standing beliefs about what some students can achieve versus others, and prevent more students growing up in schools that uphold unjust and inequitable practices.


In identifying your stakeholders we strongly encourage including individuals that reflect various lived experiences in the district. Outside of these teams, we recommend that leaders actively, consistently, and meaningfully incorporate underrepresented voices throughout the strategic planning process and not just during early stakeholder engagement activities. Such efforts will ideally provide such voices with clearer feedback opportunities and will avoid a single individual speaking on behalf of an entire stakeholder group. As a result, you might identify other stakeholder groups with whom you want to engage.



# Engaging Stakeholders to Solicit Feedback and Problem Solving



**Stakeholder  
Engagement Guide**

  
Leamers of today. Ready for tomorrow.


## Navigating this Document

**STEP 1: ARTICULATE YOUR WHY**

1. What information do I need from the stakeholders? We have developed categories of information that are important for district-wide initiatives which we articulate in the domains.
2. What will result from this information? You might need feedback, buy-in or sourcing ideas. Clarity on which will help you best select your resource.

COMMUNITY ENGAGEMENT DOMAINS	
Domain	Information we would like to glean:
PRACTICES/ SUPPORT	<ul style="list-style-type: none"> <li>• At the district/school/classroom level, what is the participant's perception of current practices/supports?</li> <li>• What are growth areas/bright spots in current practices/supports?</li> </ul>
QUALITY OF INTERACTION/ COMMUNICATION	<ul style="list-style-type: none"> <li>• How are the interactions with different parties within your community?</li> </ul>
STUDENT ACHIEVEMENT	<ul style="list-style-type: none"> <li>• How do stakeholders feel about the quality of academic achievement, and social-emotional growth?</li> </ul>
CURRICULAR RESOURCES	<ul style="list-style-type: none"> <li>• Do students and teachers have the resources needed to achieve at high levels?</li> </ul>
ACCESS AND EQUITY	<ul style="list-style-type: none"> <li>• Does your district provide equitable access to programs, extra-curriculars, and higher-level courses for all?</li> <li>• Does your district provide spaces for its students, staff, and families to feel seen, heard, and valued?</li> </ul>
COMMUNITY OUTREACH	<ul style="list-style-type: none"> <li>• How does your district work with the community to address issues that affect the well-being of all community members?</li> </ul>
OTHER	Potential topics: <ul style="list-style-type: none"> <li>• Collaborating with other districts, networks or national organizations</li> <li>• Prevailing district mindsets</li> <li>• Free response portion to add any other ideas</li> </ul>

3



BEST FOR  
STUDENTS STAFF

PRACTICES AND SUPPORT					
DISTRICT-BASED	SCHOOL-BASED	CLASSROOM-BASED			
QUALITY OF INTERACTION/ COMMUNICATION	STUDENT ACHIEVEMENT	CURRICULAR ALIGNMENT	ACCESS AND EQUITY	COMMUNITY OUTREACH	OTHER

**Empathy Building Shadowing works best, when...**

participants identify clear learning goals for the exercise, and work to assess only their own experiences as a student that day, not to evaluate teachers' or students' actions.

### What is Shadow a Student?

The Shadow a Student exercise is an opportunity for educators to come together to gain more empathy with their students in the hopes of using the experience as a way to help design instructional models and experiences for students in their community. Consider shadowing other stakeholders such as teachers or principals depending on where you want to glean insights.

**Why?** We have found that shadowing can lead to powerful observations and insights to drive change. View: [PBS-What one assistant principal learned from shadowing a student for a day.](#)

**Who?** Teachers and Administrators

**Prepare for the Day:**  
**Resource:** [Shadow a Student Challenge \(d-School\)](#)

1. Team members need to identify at least 1-2 educators to participate.
2. Principal/AP feel free to modify this [email template](#) to share with staff, students, and parents.
3. The educators who will be participating in the day need to print out the workbook. They will be responsible for sharing this experience with the Core Team. [Print workbook](#)

### Email Template:

Dear \_\_\_\_\_,

During the week of (DATES), (INSERT TEACHER NAMES) will be participating in the Shadow a Student Challenge. They will be part of a national community of school leaders clearing our calendars, silencing our walkie-talkies, throwing on sneakers, and immersing ourselves in student life for a day. Their goal is to improve the student experience at our school by better understanding the students' perspective.

On \_\_\_\_\_ [the date you've committed to], do not treat them as your \_\_\_\_\_ [their titles]. Instead, they will be a student for the day from the first to the last bell.

- **Teachers:** They will not be evaluating you on your teaching methods. Treat them as you would one of your students, including giving them that pop quiz.
- **Students:** They will not be there to watch your behavior. They will be sitting at a desk next to you, as one of your peers.
- **Parents:** They are doing this because of their commitment to improving the student experience at our school.

Learn more about the Shadow a Student Challenge at [shadowstudent.org](#)

I look forward to joining this community of educators committed to rethinking the student experience -- starting by walking in the shoes of a student. Thanks for your support. See you at the bus stop.

Sincerely,  
\_\_\_\_\_, [Your Name]

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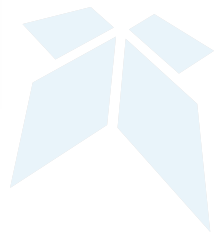




SchermCo

# SchermCo Approach





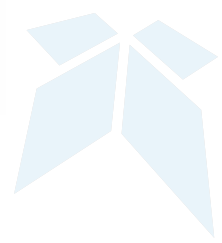
How do you build authentic  
engagement and empowerment?



“...one of valuing and co-creating with them.”

**CARNEGIE REPORT, 2018**

# SchermCo Approach





## **Goal 1**

Charter + district collaboration



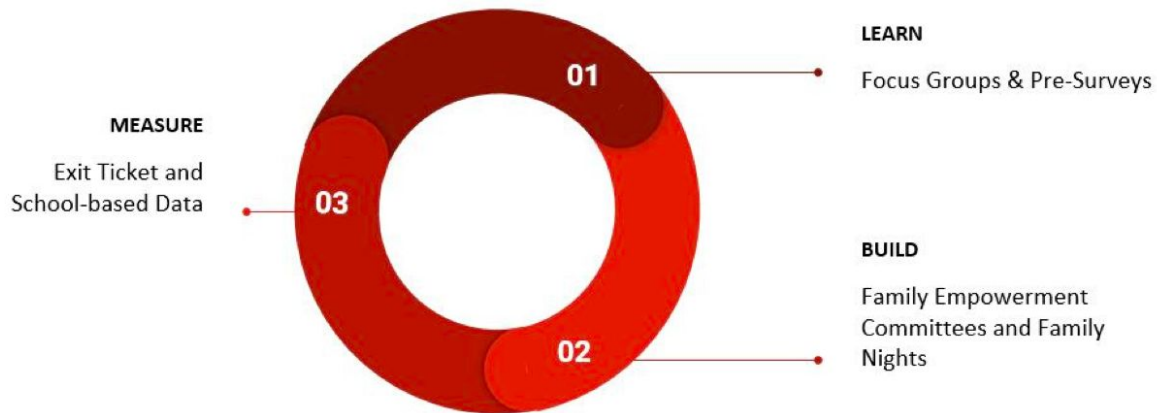
## **Goal 2**

Increase family engagement and empowerment





## Our Process

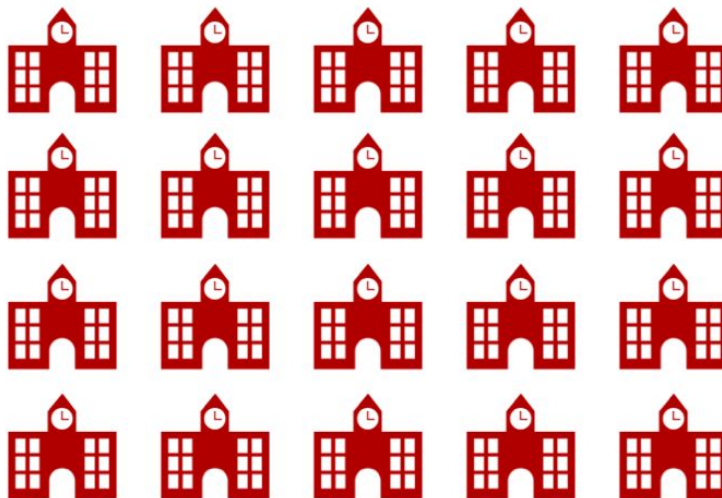






## 20 Data-Based Family Nights

Financial Literacy, Math Madness, Book Character Literacy

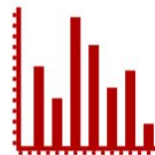




## Differentiators



Professional  
Development &  
Collaboration



Data



Community  
Partners



## Results

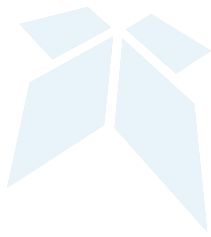
### FAMILY-NIGHT ATTENDANCE

483/912 unique families attended at least one family night across both schools.



**53%**  
BOTH SCHOOLS





## Why are people attending?

**Face-to-Face time** with a classroom teacher

Academic and personal **support** for their scholar

**Opportunity** to engage with other parents at the school



## Communication Schedule



10 Days Out



Paper and  
Electronic RSVP



5 Touchpoints



## 2018-2019 Exit Ticket Data

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**89%**

OF FAMILIES  
WOULD  
RECOMMEND  
FAMILY NIGHTS



**88%**

OF FAMILIES  
WOULD  
RECOMMEND  
FAMILY NIGHTS



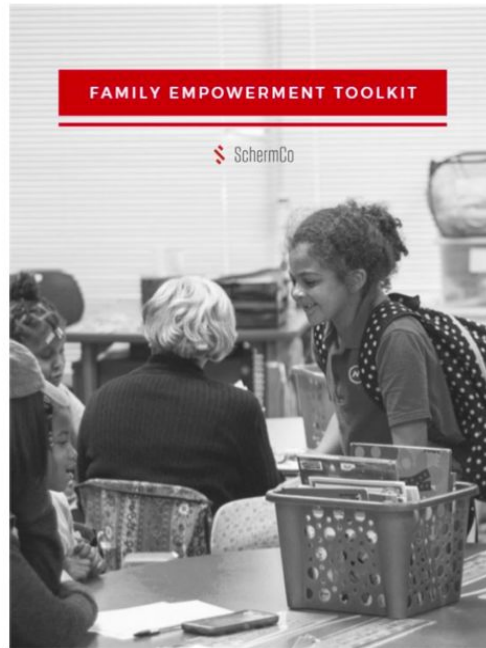


# 70%

On average, 70% of families reported using resources or skills from family nights at home with their scholar or family.



## The Toolkit

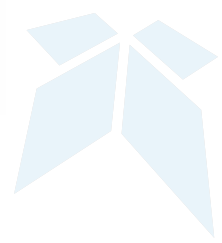






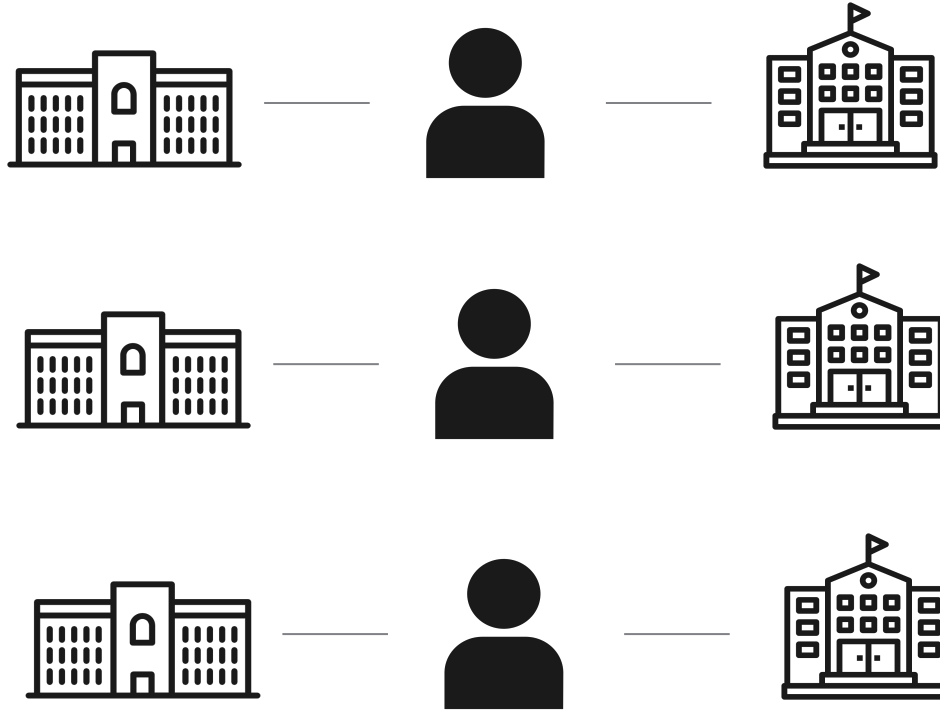
## What's Next?

- CAREER AND JOB SUPPORT
- ACADEMIC SKILL TRAINING
- FAMILY LED PODCAST



Incorporate your community  
**throughout** your process

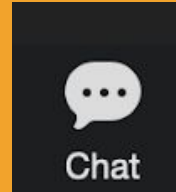
# How do you scale?





# Q & A

I USED TO BUT  
NOW I...



*PUT YOUR  
ANSWER IN  
THE CHAT!*





## STRATEGIC PLAN TOOLKIT + TRAINING

Do you have a team dedicated to lead your own strategic planning process?

This support package provides access to tools and trainings to effectively design and launch your own strategic plan.

Plan & Align\*

Foundations\*

Design & Launch\*

Support, Reflect, Iterate

## STRATEGIC PLAN CUSTOM DESIGN

Do you want a partner to support your team in creating a customized strategic plan?

This support package provides comprehensive support to design and launch a community-driven strategic plan.

Plan & Align

Foundations

Design & Launch

Support, Reflect, Iterate

## STRATEGIC PLAN CUSTOM ADD ONS

Do you need support leading community sessions?

Community Town Hall Facilitation

Do you need help visualizing your strategic plan?

Graphic Design

Plan & Align

Foundations

Design & Launch

Support, Reflect, Iterate

## STRATEGIC PLAN PULSE CHECK

Do you seek better visibility into the status of your current strategic plan?

This support package will help you to prioritize focus areas to improve implementation.

Plan & Align

Foundations

Design & Launch

Support, Reflect, Iterate