

# STRATEGIC PLANNING WEBINAR

August 26, 2019





**Andrea Goetchius**

andrea@edelements.com

Associate Partner



**Natalie Hall**

natalie.hall@edelements.com

Design Principal



**Dana Britt**

dana@edelements.com

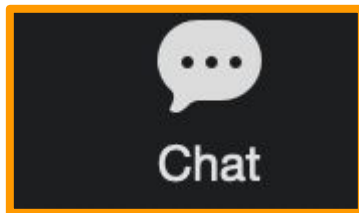
Associate Partner

Who are YOU?



**In the chat:** Share your name, role,  
and from where you are calling!

Click here



From [andrea.goetchius@edeleme...](#) to **Everyone:** 09:41 AM  
Hi Andrea Goetchius, Associate Partner calling in from  
Jacksonville Florida




# Agenda

- EE Approach to Strategic Planning
- Engaging Your Stakeholders
- Selecting Your Team
- From Ideas to Initiatives



# Education Elements Approach



*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*

# Strategic Planning Process | Adapt your Timeline



Plan + Align

Determine how your teams 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**

EACH PHASE CLARIFIES THE NEXT



# Engaging Your Stakeholders



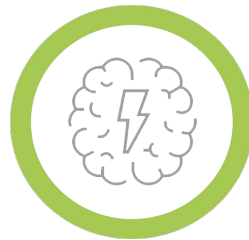
# Why is it important to engage your stakeholders?



A deep understanding of your stakeholders will ensure the following outcomes:



**Authentic representation  
of multiple viewpoints**



**Inputs that prioritize  
diversity of thought and  
perspective**



**Community investment  
in the upcoming process**

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

## 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?**

- Feedback
- Buy-in
- Source ideas

## Step 2| Identify Your Stakeholders



Students

Students enrolled in any K-12. When reaching out to students we must ensure that all programs, grade-levels and ages are represented.



District &  
School-Based Staff

All school-based staff should be included and represented which includes but is not limited to: administrators, maintenance staff, office staff, teachers' assistants and teachers.



Families

Parent or legal guardian of children enrolled in your school district



Community  
Members

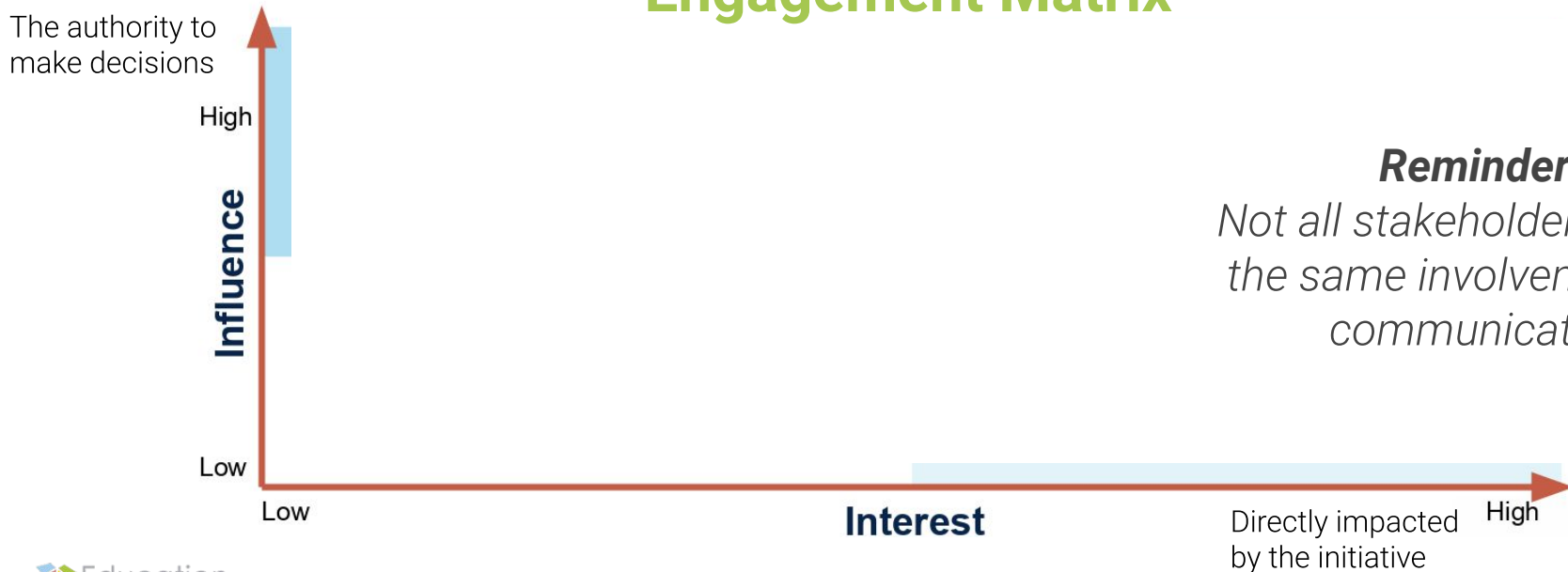
Any community member living within the school district who does not have a child currently attending school in.

## Step 3| Plot Your Stakeholders on an Engagement Matrix



To help prioritize and determine the most appropriate approach for engaging with stakeholders, try using an:

### Engagement Matrix



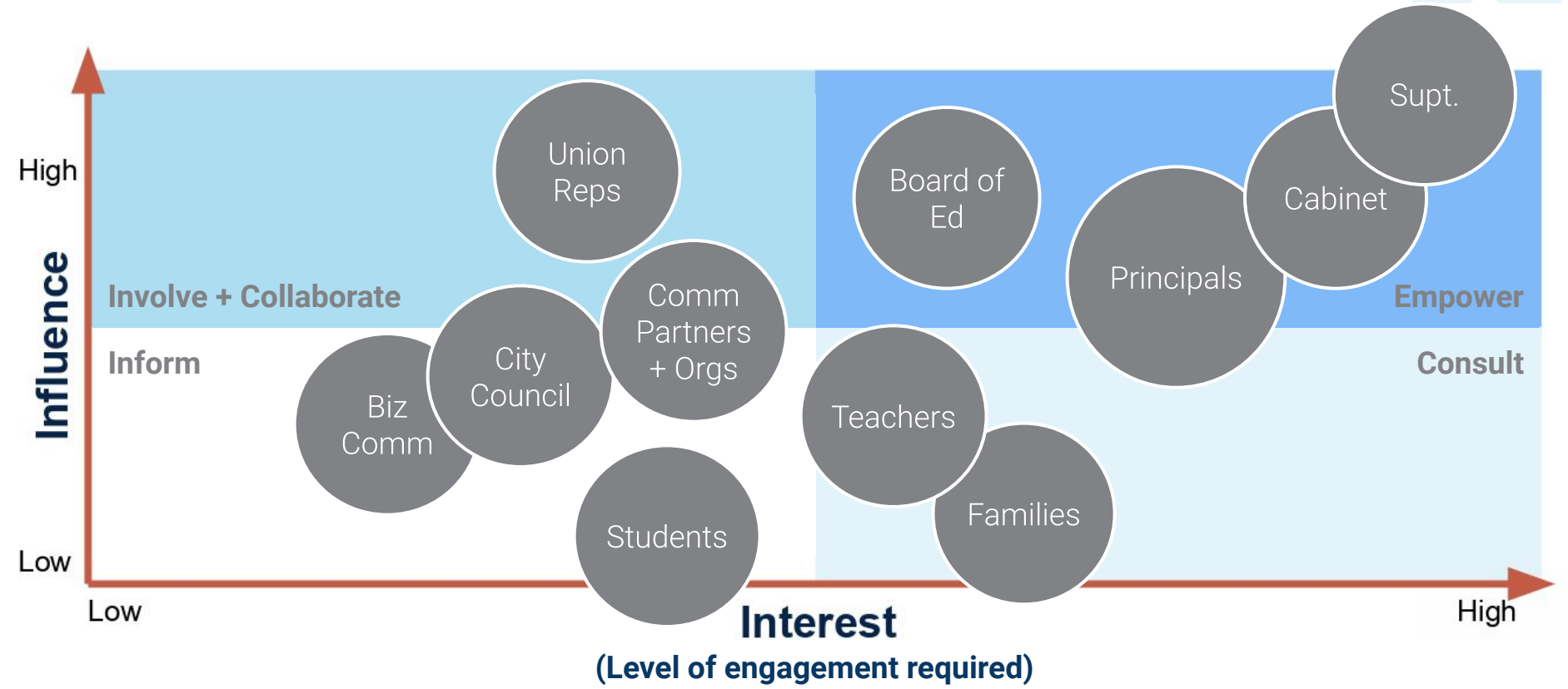
## Step 4| Explore Tactics Aligned with your Needs

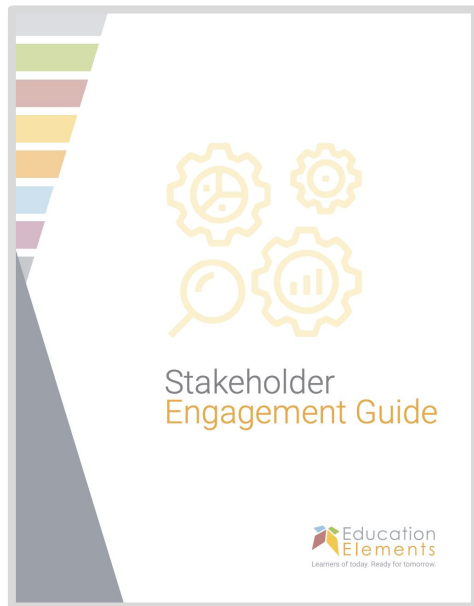


### Engagement Matrix



# Step 4| Example





Step 1| **Articulate Your Why**

Step 2| **Identify Your Stakeholders**

Step 3| **Plot Your Stakeholders on an Engagement Matrix**

Step 4| **Explore Tactics Aligned with your needs**



**In the chat:** How have you engaged stakeholder groups in the past? What has been most successful?

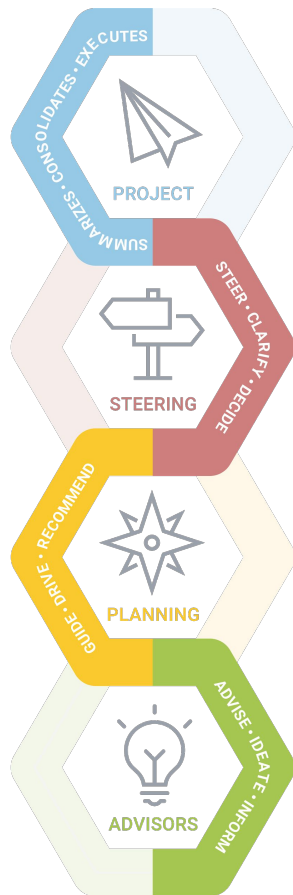
What questions do you have?





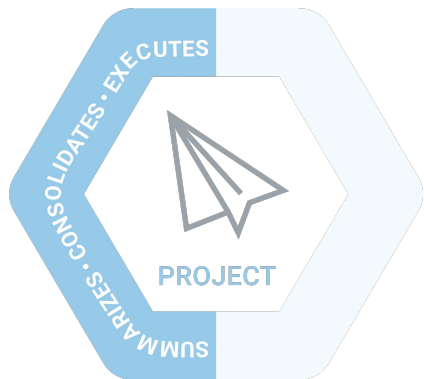
# Selecting Your Team

# Feedback Loop



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 encouraged to collaborate **actively and dynamically**.

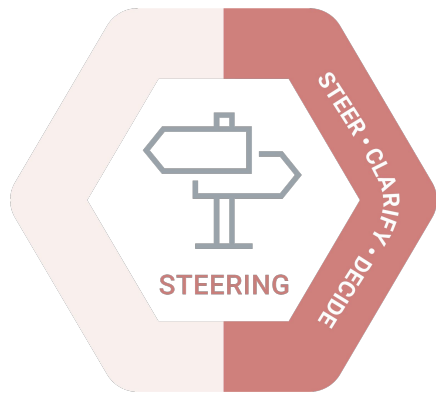


## Purpose

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 dedicated time and resource for strategic planning process.
- Highly organized and detail oriented.
- High Comfort facilitating large groups.



## 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



## Purpose

This leadership group will play an important role in engaging stakeholders, communicating the strategic plan, giving and receiving feedback, etc. Individuals in this group might be divided into teams based on topics, priorities or interests to engage the 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

- We recommend this group consist of no more than 25-30 people.
- In a large district this team will be crucial to creating and recommending priorities or initiatives within the plan.



## Purpose

This group will serve in a consultative capacity. They will help inform the strategic planning process in order for the working and Steering teams to make representative decisions. Think of this group as being a bit more dynamic where you might bring in different individuals on an “as needed” basis. The time commitment would be less than the other two groups.

## Considerations

- Number of participants will vary.
- Advisory teams are the groups of people you lean on for feedback and consultancy.
- This team(s) will provide context, perspective, feedback and ideas,



# From Ideas to Initiatives

# Our Methodology

## How Engagement Informs a Plan



Inputs...

...Inform How We Engage with Stakeholders

Plan + Align

Current state  
assessment

Initial **areas of focus** areas on which  
inquire further

Foundations

Identification  
strengths and  
needs

Initial **strategic direction:** vision,  
mission, values

Design

Ideation of  
potential  
solutions

Focused **engagement to solve for  
needs** within focus areas

Launch

Prioritize  
prototypes

**Confirm & socialize** strategic direction  
and focus areas and initiatives with;  
development of **governance plan**



# Deep Dive From Idea to Initiative



While working with a district in suburban New Jersey, we guided the Steering Team through community engagement activities that informed work between phases, and ultimately supported a plan that reflected the community's wants and needs

## Plan & Align



### Activities

Stakeholder engagement

- Interviews
- Surveys
- Forums

### Output

- Stakeholder Engagement Report
- Initial Focus Areas

## Foundations



### Activity

Planning Nights to ideate with community

### Output

Clearly aligned Focus Areas

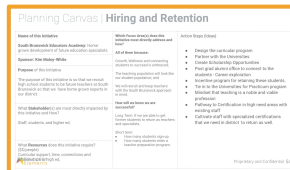
## Design

### Activity

Ideation with Planning Teams

### Output

Initiative Planning Canvases aligned to updated district Core Values



## Launch



### Activity

Socialization with broader district community

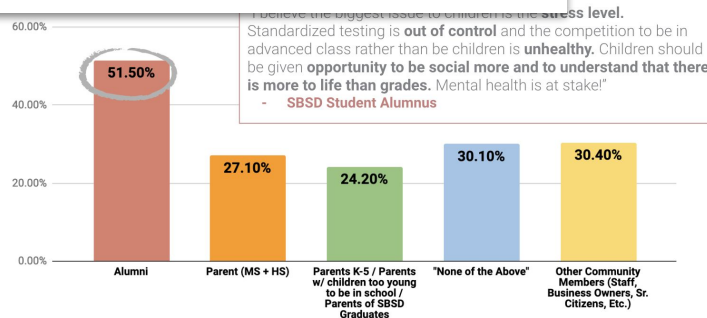
### Outputs

- Initiative One-Pagers
- Final Board Presentation
- Plan Governance Structure

# Deep Dive Key Artifacts and Deliverables



Stakeholder Engagement Summary  
Strategic Planning Initiative, 2019



## Stakeholder Engagement Report

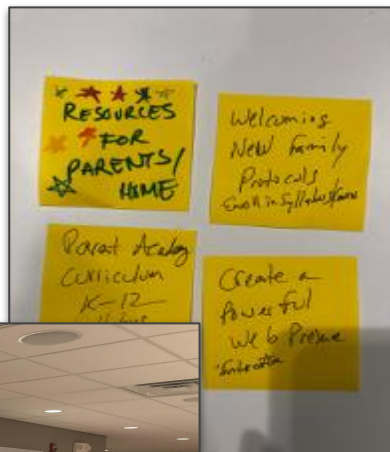
### THE WHAT

Resource of consolidated trends from various stakeholder engagement activities.

### THE WHY

Steering Team and community members used this tool to check assumptions, and more accurately brainstorm solutions to pressing district challenges.

# Deep Dive Key Artifacts and Deliverables



## Planning Nights

### THE WHAT

Four nights hosted by Steering Team centered on initial Focus Areas of Wellness, Growth, Academic Programs, and Struggling Learners.

### THE WHY

Steering Team wanted to check and validate their strategic direction and Focus Areas, and to seek more community input for potential solutions.

# Deep Dive Key Artifacts and Deliverables



## Planning Canvas | Hiring and Retention

### Name of this Initiative

**Educators Academy:** Home grown development of future education specialists

### Purpose of this Initiative

The purpose of this initiative is so that we recruit high school students to be future teachers at South Brunswick so that we have home grown experts in our district.

### What Stakeholder(s) are most directly impacted by this Initiative and How?

Staff, students, and higher ed.

### What Resources does this initiative require? (\$\$/people)

Curricular support, time, connections and relationships to high ed,



### Which Focus Area(s) does this Initiative most directly address and how?

#### All of them because:

Growth, Wellness and connecting students to succeed is embraced;

The teaching population will look like our student population; and

We will recruit and keep teachers with the South Brunswick approach in mind.

#### How will we know we are successful?

Long Term: If we are able to get former students to return as teachers and specialists.

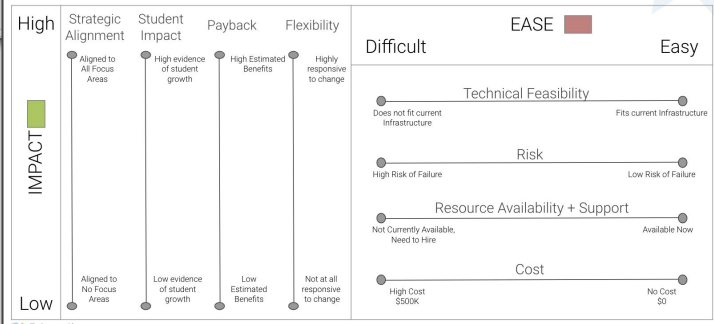
Short term:

- How many students sign-up
- How many students enter a teacher prep

### Action Steps (Ideas)

- Design the curricular program
- Partner with the Universities
- Create Scholarship Opportunities
- Post grad alumni office to connect to the students - Career exploration
- Incentive program for retaining these students.
- Tie in to the Universities for Practicum program
- Mindset that teaching is a noble and viable profession
- Pathway to Certification in high need areas with existing staff
- Cultivate staff with specialized certifications that we need in district to return as well.

## Evaluating Priorities



## Planning Canvas

### THE WHAT

Tool for organizing roles, accountabilities, timelines, and actions for potential projects or initiatives.

### THE WHY

In lieu of more traditional planning activities, the Steering Team wanted a responsive, iterative tool to brainstorm and prioritize their potential initiatives.

# Deep Dive Key Artifacts and Deliverables

## Staff Self-Care +Wellness

**FOCUS AREA** Wellness

**OUR GOAL:**  
Prioritize social, emotional, and physical well-being of staff to ensure that every member is capable of maintaining a healthy work/life balance.

**WHEN WE SUCCEED IN 2025:**

- Our staff survey will reflect an increase in positive perceptions of schools' cultures, climates, and abilities to innovate and improve overall wellness.
- The number of teachers retained will increase each year for the next 5 years.
- Staff will report a sense of feeling valued, appreciated, and recognized for their accomplishments.

**WHY THIS MATTERS:** An invaluable component in both retaining our staff and in pushing them to persist professionally is to provide them with tools to better manage the emotional and physical demands of career and life.

**INITIAL IDEAS AND ACTIONS:**

- Provide a digital and interactive wellness platform where staff can engage in self directed healthy practices.
- Foster opportunities for staff groups to share and explore health and wellness.
- PD/PLS trainings on Mindfulness, Anxiety, and other Mental Health topics and available supports
- Use the Governance protocol to develop norms and expectations for a variety of operational responsibilities.

**Timeline and Next Steps**

Legend: Research/Discovery (Green), Transition Period (Yellow), Implementing (Blue)

SY 2019-2020 (July - December)	SY 2019-2020 (January - June)	SY 2020-2021	SY 2021-2022
Research/Discovery	Transition Period	Implementing	Implementing

The team is ready to launch some of the ideas and initiatives immediately! Please contact XXXXX if you are interested in learning more!

Ignite your passion.  
Nurture your potential.  
Embrace your future.

## Device Initiative

**Big Headlines**

- 100% T
- Acad
- ed St
- ling + St
- g for G
- PAKER S
- ized for
- Univers
- culturally

**Who are OUR Messengers?**

- Union Leadership
- Care Team
- Business Partners
- Community
- Parents
- Students
- Teachers
- Administrators

**100% T**

**Communication methods and tactics**

- Personalized
- Direct
- Indirect
- One-on-One
- Small Group
- Large Group
- Virtual
- Face-to-Face

**The Bottom Line:**

- RETHINKING SCHOOL
- CHANGE THAT MATTERS!

Access to technology and tools for all staff and students in order to ensure access to teaching and learning.

**SUCCEED IN 2025:**  
100% of teachers and students in identified grade levels will have access to 1:1 technology. Instructional practices will shift to further promote opportunities for personalized learning.

**MATTERS:** Providing necessary digital tools to ensure greater instructional flexibility, services, and expanded opportunities for learning experiences anytime, anywhere.

**PLANS AND ACTIONS:**  
Develop a vision and the policies for staff and student use by grade level. Assess the financial impact of implementing and using a 1:1 environment. Align Future Ready goals and connect to this initiative. Ensure internet accessibility at home and for any student in need. Sustained and in-class supported personal learning opportunities.

**Timeline and Next Steps**

Legend: Research/Discovery (Green), Transition Period (Yellow), Implementing (Blue)

SY 2019-2020 (July - December)	SY 2019-2020 (January - June)	SY 2020-2021	SY 2021-2022
Research/Discovery	Transition Period	Implementing	Implementing

**July - December:** Develop a vision. Evaluate Financial Impact, Research

**January-June:** Identify grade levels and pilot teachers for a 4-month implementation

**SY 2020 - 2021:** First tier of 1:1 device initiative implementation

**SY 2021 - 2022:** Second tier of 1:1 device initiative implementation

Ignite your passion.  
Nurture your potential.  
Embrace your future.

## Initiative One-Pagers

### THE WHAT

Concise one-page documents to communicate the what, why, and timeline or initiatives.

### THE WHY

After prioritizing their initiatives, the Steering Team wanted a communication strategy to pilot and share with school administrators - one-pagers served as an easy way to seek feedback from other district leadership.



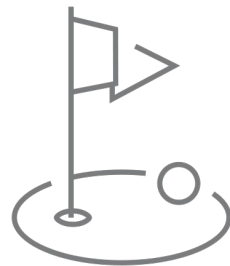
**In the chat:** What about this approach resonates with you?  
What challenges you?

# Dive Deeper with Us



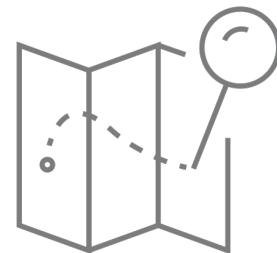
EXPAND

**Strategic Planning  
Webinar: Design & Launch**  
September 25 - 2pm ET



PRACTICE

**Strategic Planning  
Institute**  
October 3-4 - Denver, CO



PLAN

**1-1 Coaching Call to  
discuss your next steps**

# Partner with Us



## 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



YOU'RE INVITED TO THE

# Strategic Planning Leadership Institute

How can we create an inspiring  
and responsive strategic plan?

October 3 - 4, 2019 in Denver, Colorado  
[bit.ly/EE-Strategic-Planning-LI](https://bit.ly/EE-Strategic-Planning-LI)

