



ROCORI Public Schools

**Classroom to Boardroom (Strategic Planning) and Board Leadership
Development**

02-23-2024

In partnership with
Paul Neubauer, Senior Consultant

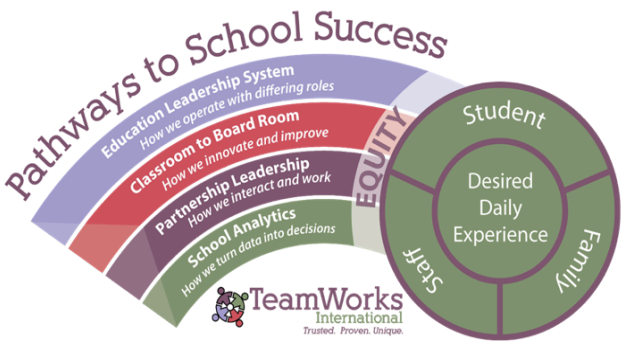


Prepared for:

PREPARED FOR:	PREPARED BY:		
<p>ROCORI Public Schools Superintendent Kevin Enerson School Address: 534 5th Ave. North Cold Spring, MN 56320 Phone 320-685-4185 Email: enersonk@rocori.k12.mn.us</p>	<p>Consultant: Paul Neubauer Title: Senior Consultant TeamWorks C: 612-221-4666 E: paul@teamworks4ed.com</p>	<p>Dr. Ray Queener Owner & Principal Consultant TeamWorks C: 651.336.4015 ray@teamworks4ed.com</p>	<p>TeamWorks 7037 20th Ave. S., Suite A Centerville, MN 55038 Office: 651.429.7340 Fax: 651.429.7782</p>

INTRODUCTION TO TEAMWORKS INTERNATIONAL, INC.

For 28 years, TeamWorks International, Inc. has been working with organizations to enhance their capacity for strategic, constructive change resulting in realization of vision in practical and measurable ways. Our clients come from education, community, religious, business, and government settings but they share a common aspiration; to achieve their goals while remaining healthy, dynamic, and accountable.

<p>OUR MISSION</p> <p>In partnership with school districts, we support design and delivery of the desired daily experience and outcomes for students, families, and staff in bridging the difference between What Is and What Ought to Be</p>	<p>OUR CORE APPROACH</p> <ul style="list-style-type: none"> ● We honor our clients as competent and offer realism, hope and compassion in challenging situations. ● We take the time to really know our clients and their organizations. ● We customize our services specifically for each client and each situation. ● We are co-learners with our clients and recognize the value of their perceptions and insights. ● We have made a conscious choice to engage in this work in these environments and are deeply invested in our clients' success.
<p>OUR TOOLS</p> <p>Proprietary FrameWorks™ Series ~ FrameWorks are graphical images that help guide and support leadership and organizational development. Developed and delivered exclusively by TeamWorks professionals, these simple, memorable images provide both a process and a frame of reference through which leaders can interpret and manage complex webs of situations, environments, people, and influences.</p>	
<p>OUR CORE SERVICES</p>	
<p>Education Leadership System Services</p>	<p>The Education Leadership System (ELS) is an established approach for aligning school boards, administration, staff, and the public to increase learning for all students. ELS clarifies the roles, responsibilities, and relationships that are most often at the source of tension and conflict among these groups of adults.</p>
<p>Classroom to Boardroom Strategic Planning and Performance Improvement Service</p>	<p>We help clients integrate their mission, vision, strategies, structures, success systems and leadership practice. We then develop a roadmap for the ongoing organizational journey. Our comprehensive, practical and personalized approach encourages those in governance, management and consultative roles to work in concert for the mission and success of their organization.</p>
<p>Partnership Leadership Services</p>	<p>TeamWorks International has earned a national reputation for helping organizations develop the capacity for Partnership Leadership, a compliment to the traditional “command/control” style of leadership. Through this approach, organizations become more adaptive, responsive and proactive as individuals and groups at different levels of authority and begin to use consistent images, language and process in their interactions with one another.</p>
<p>School Analytics</p>	<p>School Analytics involves the synthesis of client data with relevant external data derived from demographic research, surveys and cultural analyses to deepen clients’ understanding of both challenges and opportunities. Our specific services include GIS mapping, online surveys, customized research and analysis, and student learning analytics.</p>

OVERVIEW

ROCORI School Superintendent Kevin Enerson has requested TeamWorks (TW) of Centerville, Minnesota, provide the following Proposal for Services DRAFT to assist the Superintendent and School Board in comprehensive strategic planning .

The following proposal outlines the services that may be provided by TeamWorks:

Service	Page
<u>Classroom to Boardroom</u> Strategic Planning Process	4-10

Our initial Fee Estimates are described on page 11-12.

Following receipt of this DRAFT Proposal for Services, we invite the Superintendent, School Board and/or key administrative team members to engage in a collaborative Proposal Review and Co-Design Session to finalize needs and services that operate within district parameters of time, people, and funding.

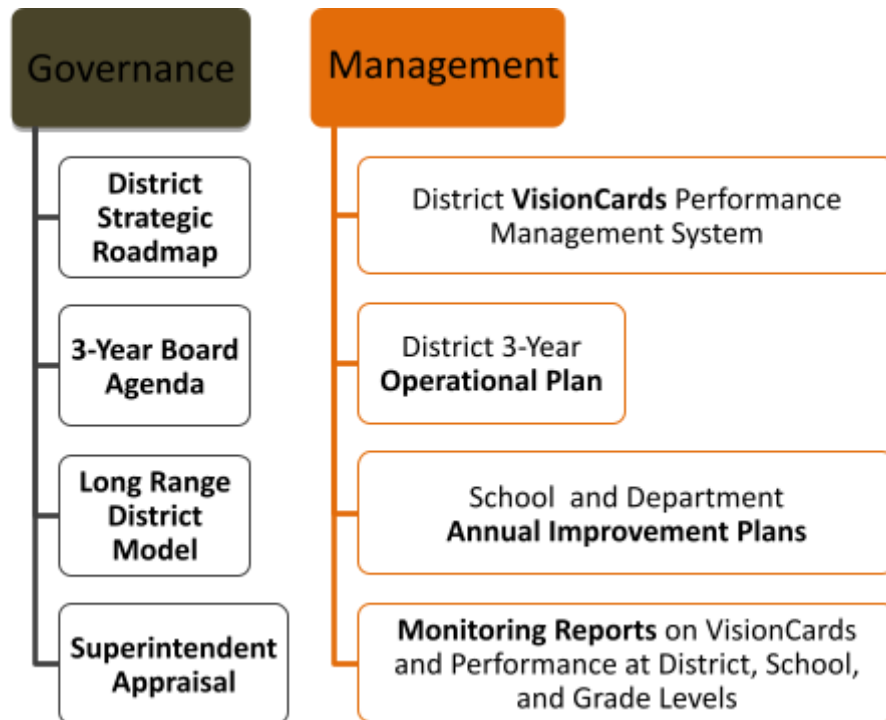
CLASSROOM TO BOARDROOM COMPREHENSIVE STRATEGIC PLANNING PROCESS KEY DELIVERABLES

1. Insightful Environmental Scan and StoryWall Report to provide a baseline assessment from stakeholders internal and external to the district.
2. Descriptive Vision for the Desired Daily Experiences (DDE) of students, families, and staff.
3. District Theory of Action for each and every classroom that provides for that descriptive vision.
4. District VisionCard that defines the measures of success and the metrics that display the trends of improvement on the way to delivery on the vision (DDE).
5. District 3 Year Operational Plan of the key Strategic Directions for continuous improvement and the associated district initiatives across all schools as well as the unique school projects.
6. School and Department Annual Improvement Plans in alignment with the District 3 Year Operational Plan, District VisionCard, and Key Strategic Directions.
7. District Strategic Roadmap, which is an act of governance and describes on 1 sheet the Mission, Core Values, Vision, and Strategic Directions of the district.
8. Board of Education 3 Year Governance Workplan which details the key work of the Board in parallel to the District 3-5 Year Operational Plan through the key roles of the Board of Education which are 1) District Policy, 2) Operational Oversight and Long-Range Planning, 3) Board Self-Governance, 4) Director Relations, and 5) Public Engagement.



CLASSROOM TO BOARDROOM COMPREHENSIVE STRATEGIC PLANNING PROCESS KEY ELEMENTS AND OWNERSHIP

The deliverables from the previous page provide the tools necessary for both the district management accomplishment of the plan and the board's governance responsibilities to provide the oversight and direction necessary for delivering on the vision of the district.



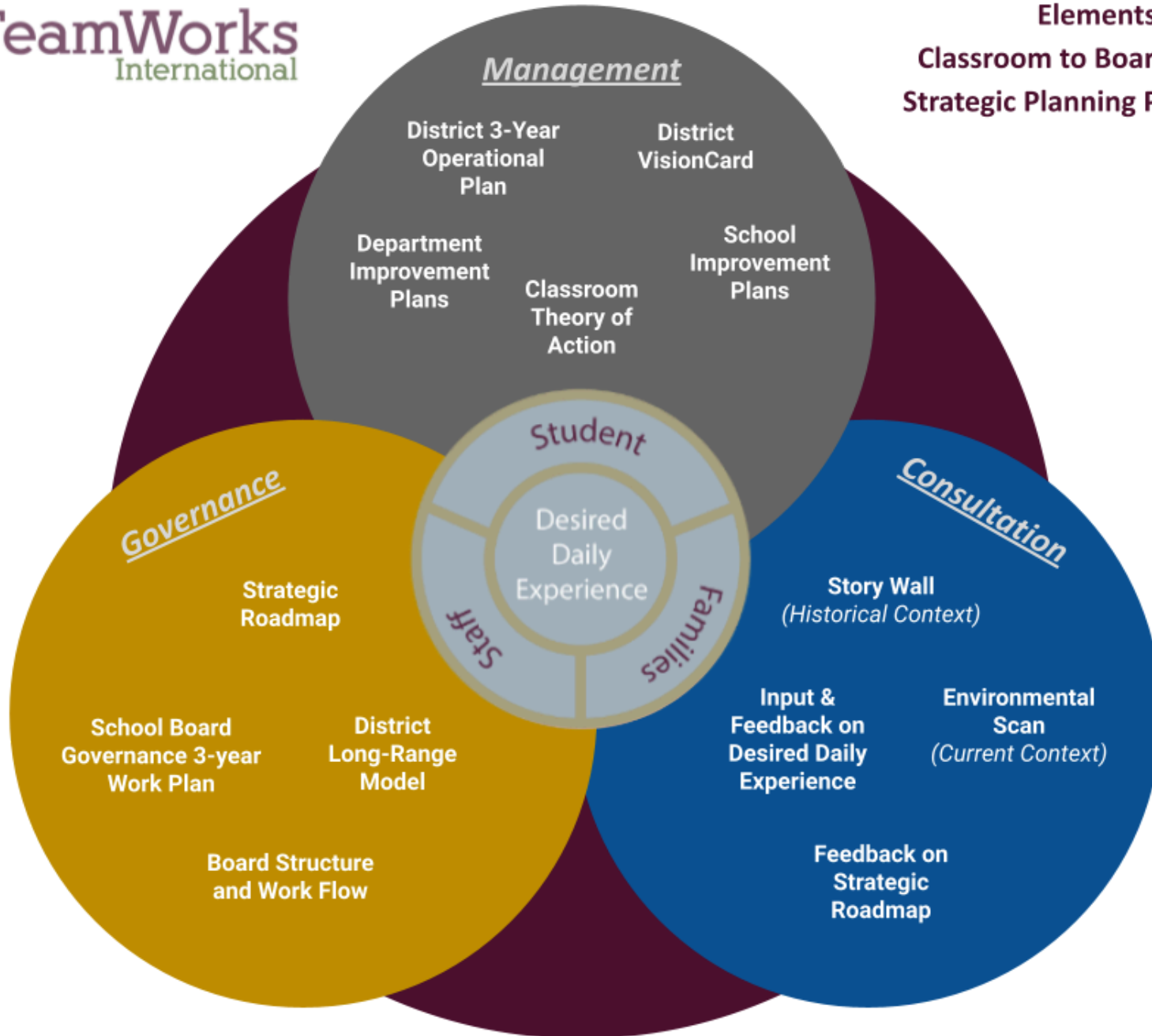
WHAT MAKES CLASSROOM TO BOARDROOM DIFFERENT THAN TRADITIONAL STRATEGIC PLANNING PROCESSES?

Our strategic planning process is different than traditional strategic planning in these key ways:

- 1.) This is a *one-time* investment that provides *continuous* planning and allows you to maintain an up-to-date three-year operational plan and three-year governance work plan.
- 2.) This process asks your staff and administrators to engage in, and be accountable for, a process of assessment, development, planning, and prioritization as the professional educators of the district. In many traditional strategic planning processes, parents and the public (many who are not professional educators) are driving the focus of the strategic and operational plans for schools and departments. With Classroom to Boardroom, parents and the public play a critical role providing consultation at key points in the process, but they are not steering the strategic and operational direction of the district. That role is left to the professional educators.
- 3.) This is an “up and out” vs. “down and in” process. In many traditional strategic planning processes, the experiential needs of students, staff and families aren’t accounted for or articulated. The foundation of Classroom to Boardroom is a clear articulation of the *Desired Daily Experience* of students, staff and families - recognizing and giving voice to every member of your school district community.
- 4.) This process provides a clear delineation between the strategic governance responsibilities of the school board, and the management role of district administrators. At the end of the process, the School Board develops a Strategic Roadmap for its governance work of oversight, policy, and community engagement. This roadmap is grounded in governance, leaving the “nuts and bolts” management work of the strategic and operational plans to the district administrators (*see graphic, left*).



Elements of the Classroom to Boardroom Strategic Planning Process



CLASSROOM TO BOARDROOM SESSION OUTLINE AND TIMING

Session / Topic	Purpose / Outcome	Who	Timeline
A. Design	Shared design development session	Leadership Team	Typically we break this into two (1-hour) meetings, with the first one focused on big-picture process/timing and the second one focused on detailed scheduling and logistics.
B. Education Leadership System (ELS): Orientation Session 1 (Optional)	<p>Three-hour session</p> <ul style="list-style-type: none"> Roles and responsibilities of school boards, Executive Director, administrators, staff, parents, and public in delivering on the Desired Daily Experience for students, families, and staff. The partnership relationship needed between those who govern (school board) and those who manage (administration) in order to be effective, efficient, and meeting goals and expectations. Assessment of the Board’s current reality. Governing and managing in the “public square” with its social media, dissonance, and division while needing to move forward in partnership and accountability. <p>Prior to session: <i>Survey of school board and leadership team for assessment of current reality.</i></p>	<p>School Board and District Leaders</p> <p>Building Administrators</p>	<p>3 hour session</p> <p>Could be scheduled during a School Board work session.</p>
C. Storywall and Lifecycle Session	<p>Three-hour session</p> <ul style="list-style-type: none"> Introduction and Storywall Development. Identify and honor the District’s history. Identify the events and trends that have shaped the District’s development dating back to the longest-serving staff member in the room. 	<p>Strategic Planning Team + Other community and staff members</p>	<p>3 hours; can schedule back-to-back with (D)</p>
D. Environmental Scan	<p>Three-hour session</p> <ul style="list-style-type: none"> Environmental Scan and Insights for Desired Daily Experience: Provides a baseline for the current reality of the school district as to what is well established, what is ebbing, what is emerging and what is on the edge of consideration and development. This process applies a Whole System View in the analysis. 	<p>Strategic Planning Team + Other community and staff members</p>	<p>3 hours; can schedule back-to-back with “C” for a day-long workshop.</p>

Session / Topic	Purpose / Outcome	Who	Timeline
E. Engagement about Desired Daily Experience (DDE)	School and Community-based Stakeholder Engagement Affinity-based facilitated stakeholder sessions ensuring representation of demographics of district: <ul style="list-style-type: none"> • <i>Desired experiences of students (up to 5 sessions)</i> • <i>Desired experiences of parents/families (up to 3 sessions)</i> • <i>Desired experiences of staff (up to 3 sessions)</i> • <i>Community Engagement (up to 2 sessions)</i> 	Affinity-based stakeholder sessions	Six 90-minute sessions. Can begin immediately, this step is <u>not</u> sequential with A, B, C, D.
F. Desired Daily Experience (DDE) - Draft	Three-hour session <ul style="list-style-type: none"> • Develop a draft of the desired daily experience for students, staff and families that serves as a clear vision for the strategic plan. 	Strategic Planning Team	3-hr session Prefer to schedule at least one week after E
G. Engagement about Desired Daily Experience (DDE)	Feedback survey of students (grades TBD), families, and staff ensuring representation of demographics of district.	Survey	Allow 10 days for responses.
H. Classroom Theory of Action and DDE	Three-hour session <ul style="list-style-type: none"> • DDE Input/Draft/Refine based on survey results • DRAFT of a District Classroom Theory of Action 	Strategic Planning Team	3-hour session. Schedule at least 5 days after the close of the survey.
I. School and Department Data Needs and Analysis	Three-hour session <ul style="list-style-type: none"> • Assess current reality of classrooms and student engagement within schools • Assessment of the quality and description of the value proposition for district departments • Development of District’s Key Strengths and Needs 	Strategic Planning Team + Building Leadership Teams representatives + Department Leadership	3-hour session. Not sequential, can take place anytime after D. Schedule when it’s easy to gather this expanded group.
J. Classroom to Boardroom Process update	One-hour session with school board <ul style="list-style-type: none"> • Update on StoryWall and Environmental Scan sessions • Report on DDE with engagement and feedback • Review of school and department data • Review of TOA, VisionCard • Overview of draft Operational Plan • Report on DDE with engagement and feedback 	School Board	30 minutes, in person or virtual. Coincide with work session or board meeting.

Session / Topic	Purpose / Outcome	Who	Timeline
K. School VisionCard	Three-hour session on <ul style="list-style-type: none"> School VisionCard - Develop a one-page document detailing the key measures and metrics for successful implementation of the DDE and what attainment of Vision looks like in numbers. Session will focus on updating and revising current vision cards aligned with new desired daily experiences. 	Strategic Planning Team	3-hour session. Could combine I, J, K in one trip. Or I/J, K/L
L. School 3-Year Operational Plan	Three-hour session on <ul style="list-style-type: none"> School 3 Year Operational Plan of the key school initiatives and school / department projects needed for continuous improvement organized into specific Strategic Directions through 2023 – 2026 school year. Reflection and refinement of Theory of Action and DDE Key messages and preparation for community feedback 	Strategic Planning Team	3-hour session.
M. School VisionCard, School 3-Year Operational Plan	Three-hour session <ul style="list-style-type: none"> Final draft of School VisionCard Final draft of School 3 Year Operational Plan Key messages 	Strategic Planning Team	3-hour session. Schedule a 1-week window between L & M
N. Strategic Roadmap Session - Draft	Up to a Three-hour session <ul style="list-style-type: none"> Refine the School Mission, Core Values, and Vision, with the Strategic Directions of the Operational Plan organized on one page 	School Board + Leadership Team	3-hour session. One week after M
O. Strategic Roadmap Final	One to three-hour session Refine Strategic Roadmap based upon community & staff feedback prior to board action	School Board + Leadership Team	2 hour session Schedule during a work session to review and work on revisions, then vote on at the next board mtg.
P. School Board 3 Year Work Plan	Three-hour session Develop the details of the key work of the Board of education in parallel to the District 3 Year Operational Plan, such as 1) School policy development, 2) Operational Oversight and Long-Range Planning, 3) Board Self-Governance and Development, 4) Director Relations and Development, and 5) Public Engagement.	School Board + Leadership Team	2-hour session. Could combine with the start of O (draft work). Or P/Q could be a combo

Session / Topic	Purpose / Outcome	Who	Timeline
Q. School Board Structures, Practices & Governance Session	Three-hour session Assessment and refinement of Board structures of meetings, workflow, and committees to best implement its 3 Year Work Plan and operate as a governing board	School Board + Leadership Team	2-hour session. Could combine with P (refining P).
R. District 3 Year Operational Plan, School and Department Improvement Plans	Three-hour session Development of school and department Annual Improvement Plans	Building Leadership Teams + Department Leadership	3-hour session. Could combine with P and/or Q, day after.

CONSULTING FEE ESTIMATES

Services*	Costs
<p><u>Full Classroom to Boardroom</u> - Comprehensive Strategic Planning Process</p> <ul style="list-style-type: none"> • All sessions described on pages 8-10 facilitated by TeamWorks • Includes focus groups facilitated by TW consultant [up to 6 sessions: students (2), families (2) and staff (2)] for development of Desired Daily Experience. • Includes preparation and reports for every session. Classroom to Boardroom Strategic Planning Process 	<p>\$28,100 estimated</p> <p><i>(NOTE: price will vary depending on final design but estimate includes <u>all</u> sessions and services specified on pages 7-10)</i></p>

Selection of consultants applied to each step will be determined by Kevin Enerson Superintendent of Schools ROCORI Public Schools, in consultation with Paul Neubauer and Dr. Ray Queener.

CONTRACT AND BILLING

- The proposed fees and process herein are valid for 6 months beyond the date on the cover of the proposal. If the proposal has not been agreed to within that time, it is invalid and a new proposal will be drafted.
- Upon discussion, refinement and approval of this Proposal for Services, this proposal will be an addendum to a formal contract between the Client and TeamWorks International, Inc.
- Invoices for completion of work will be on a monthly basis and reflect the services provided and expenses incurred during the previous 30 days.
- Additional services, outside the scope of this estimated proposal, may be provided at the rates presented above and with agreement of clients and consultant through a work order/proposal addendum.

EXPENSES

- Traveling expenses (flights, hotel, dining) are not included in the above quote and are invoiced at-cost.
- Travel time over one (1) hour is invoiced @ \$ 30 / hour. Mileage will be charged according to the IRS deductible costs.
- Materials quoted include, but are not limited to, session and workshop supplies not provided by the client, copies of materials by TWI, and professionally published materials provided by TWI

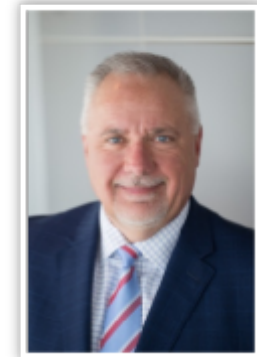
ADA CONSIDERATIONS

- At the beginning of the project, please alert TeamWorks International regarding the need for documents compatible for Assistive Technology or meeting facilitation conducive to participants with various needs.

CONSULTANTS

Dr. Ray Queener Owner and Principal Consultant

Ray Queener, Owner and Principal consultant at TeamWorks International, blends his experience across multiple arenas to assist clients in the areas of partnership skills, strategic growth, personality and motivation awareness, and systemic alignment and accountability. Ray is known for his ease and comfort in working side by side with clients to approach each project with insight and compassion. Both lighthearted and results oriented, Ray brings energy, focus and hope to the organizations that he is honored to serve.



Ray has a wealth of experience in education having served in multiple capacities over 30 years. His work in education began as a secondary math teacher in Luck, WI. Having a vision for integrating technology into the classroom, he was able to further that vision as he served as technology coordinator for South St. Paul Schools and later Rosemount-Apple Valley-Eagan (ISD 196). He transitioned to finance director at ISD 196 and later Stillwater Area Public Schools (SAPS) where he gained valuable experiences learning organizational operations while continuing to serve in public education. Both as an assistant superintendent at SAPS for 10 years and over 6 years as superintendent for Cambridge-Isanti Schools, he has helped lead successful bond and levy referendums in addition to overseeing district operations.

Service is evident in Ray's support for public education serving as Executive Board Member for Schools for Equity in Education (SEE) for many years. He also served on the Minnesota Association of School Administrators (MASA) board and was the Region VI Leadership Team Chair. He was nominated and received several awards from his colleagues including Administrator of Excellence in 2017. Ray's commitment to partnership, and his enthusiasm for supporting others as they learn and develop made him an ideal addition to the TeamWorks team in 2019.

Ray's work with clients includes: Strategic and tactical planning grounded in organizational Vision; VisionCard accountability systems development and implementation to ensure continuous improvement knowledge and capacity development; Executive Coaching; customizing leadership development for clients through the Frameworks® Partnership Series grounded in TeamWorks' proprietary FrameWorks™ and Organizational Development theory; and, Critical Position Benchmarks to assure job--fit in key hires or restructuring.

Ray is recognized as a National Certified Superintendent through American Association of School Administrators (AASA) He earned his Doctorate in Educational Policy & Administration and received his Superintendent License from the University of Minnesota. He earned his Master of Arts in Educational Administration from St. Mary's University of Minnesota where he also continues on as adjunct faculty. He has a Bachelor of Science in Secondary Mathematics Education with a minor in Computer Science from University of Minnesota.

Paul Neubauer
Senior Consultant

Paul Neubauer’s expertise, experience and practical application of educational concepts has provided the educational community with opportunities to remove barriers to student success as well as to collaboratively build pathways to promote and secure successful student outcomes. Central to Paul’s work is a foundational belief that all students can learn at high levels and that a well-aligned educational system will provide the conduit to student success. Throughout his career, Paul has demonstrated core values of strong work ethic, reflection, and building positive relationships under the umbrella of a growth model. His work to align research, best practices, and practical application has resulted in long term, systemic change throughout the organizations with which he has worked.



Paul’s experience includes eight years as a Superintendent, three years as Director of Curriculum and Assessment, and 12 years of administrative experience at the secondary level as a High School Principal, Assistant Principal and a Middle School Dean of Students.

Paul earned his Bachelor’s Degree in English Education and German from Dickinson State University (Dickinson, ND), his Masters of Science Degree from in Health Physical Education Recreation and Dance with a concentration in Athletic Administration from South Dakota State University (Brookings, SD), and his Administrative Licensure from St. Cloud State University (St. Cloud, MN). Paul is distinguished as a Coach of the Year, Central Minnesota Assistant Principal of the Year, Central Minnesota Principal of the Year and has promoted excellence in education since 1983.

ADDITIONAL TEAMWORKS INTERNATIONAL TEAM MEMBERS

Rich Swanson

Insight Services Manager, Research Analyst

Rich joined TeamWorks International in the fall of 2009 as the manager of our Insight Research Department. He holds a B.S. in geology from Winona State University and a Masters in geography from Hunter College of the City University in New York. Rich's extensive background and experience in private business, military, government, k-12 public education, post-secondary education, faith-based organizations and various non-profit industries has allowed him to develop unique insight and a system approach to serving a wide range of client needs. Rich also serves as faculty at Southeast Technical College where he teaches courses on Physical and World Regional Geography.

Matt Pohl

Geospatial Technology Manager

Matt began working with TeamWorks International in March of 2010. He has a B.S. in geography from the University of Wisconsin LaCrosse and a Masters in GIS (Geographic Information Systems) from St. Mary's University of Minnesota. Before joining TeamWorks, Matt was the GIS coordinator for Buffalo County, WI. Matt works hand-in-hand with many of TeamWorks' clients, helping them discover relationships within their data and ensuring efficacy in future planning. Matt is responsible for the development, deployment and administration of Insight Online, TeamWorks' web-based mapping and analytical tool.

Connie Buberl

Contract Specialist

Connie joined TeamWorks International in 2012 as an administrator with a background in record keeping, finance, and office management. With her expertise, she assists the team on logistics, client contact and is the lead contact for client invoicing. She previously worked with SIMA International and the US Bank branch both located in Stillwater, MN.