

*Proposal for Data-Based  
Strategic Planning Services*

*For*



Prepared by Debbie Stair  
Assistant Director of Leadership Development  
October 15, 2024

## ***Strategic Planning Process***

School districts today are challenged to do more than ever before with scarce resources so planning for the future is more important than ever. MASB's Data-based Strategic Planning Process will address three key questions for your district:

- ➔ **Where is the District now?**
- ➔ **Where is the District going?**
- ➔ **How will the District get there?**

Data-based Strategic Planning establishes priorities, focuses energy and resources, strengthens operations and ensures all stakeholders are working toward the achievement of common goals for the District.



## ***Why Michigan Association of School Boards?***

MASB has facilitated strategic planning processes and goal-setting processes with over 100 school districts. Our facilitators have extensive experience in strategic planning as well as backgrounds in education and/or board service. These dual competencies uniquely position MASB to customize a strategic planning process that 'fits' your district.

The following key assumptions are made when we propose when partnering with a school district to facilitate a strategic planning/renewal process:

The process must be customized to align with the district's specific needs and incorporate current plans and processes

Board of Education members must be an integral part of the process – providing input, support and commitment

The process must be transparent and inclusive of all stakeholders



Quantitative data must be used with perceptive data to guide the district in identifying priority goals/strategies

The process must include development/renewal of the vision, mission and belief statements

The strategic plan must guide allocation of all District resources

The process must include a framework to ensure implementation and evaluation

### ***Deliverables***

MASB's Data-based Strategic Planning Process includes:

A pre-planning session with the Superintendent

A facilitated conversation with the Board of Education and District Administrators to gain input

Up to six face-to-face focus group input sessions with stakeholders. i.e. staff, parents, community members, etc.

One virtual focus group for all stakeholders

A summary and analysis of stakeholder input (qualitative/perceptual data)

Educational data report (quantitative data) including 5-year district trend data comparing the District with five reference districts and state averages

Planning and facilitation of strategic planning retreat for approximately 40 planning team members

Planning and facilitation of implementation workshop with key staff

Written documentation summary of the planning process

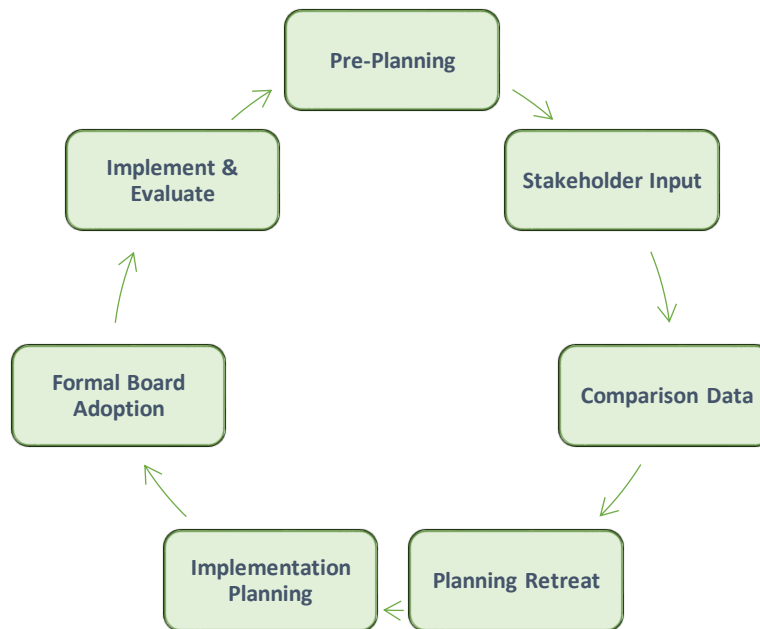
An executive summary of the strategic plan

Recommendations for development of a board monitoring calendar

Templates for a press releases and communications



## *Fundamentals of the Process*



### PRE-PLANNING

The pre-planning phase begins with a brief presentation at a regularly scheduled Board of Education meeting if desired. A work session will be scheduled with the Board and the Administration as well to review the strategic planning process and to provide opportunity for input.

### COMMUNITY AND STAFF INPUT

Staff, community, student and parent input will be gathered through focus group sessions as well as an electronic collector. The survey instrument will be administered by MASB, ensuring that all responses are anonymous.

Input questions are open-ended by design and focus on:

- Strengths of the district
- Opportunities for improvement
- Barriers to implementation
- Vision for the district



### EDUCATIONAL DATA REPORT

Trend and comparison data will be provided and explored. This includes:

- Student Enrollment and Demographics
- Student Learning
- Financial
- Personnel

The data will be compared to state averages as well as five reference districts to be chosen by the Board and Superintendent.

### STRATEGY FORMULATION

Strategy formulation occurs at the facilitated Strategic Planning Team Retreat. An 8-hour strategic planning team retreat generally includes:

- Environmental Scan
- Review current status/progress of district
- Develop/renew/review vision, mission and beliefs
- Review educational data audit summary
- Review stakeholder input summary
- Identify key strategic goal areas
- Identify 12-18 month priorities for each strategic goal
- Develop goal statements
- Communicate plan for implementation and process forward

The planning team varies but most often consists of board members, superintendent, select administrators and representatives from teachers, staff, students and community. MASB will work closely with the District to ensure the diversity of stakeholder groups is represented.

### IMPLEMENTATION/EVALUATION

MASB provides facilitation of an implementation workshop with key staff members and school improvement team leaders as well as recommendations for the implementation of the strategic plan. The implementation plan will include timelines and a Board monitoring calendar. The Superintendent and key staff will be responsible for carrying out plan implementation.



### TIMELINES

A comprehensive strategic planning process can be completed in 3-4 months. The proposed timeline will be developed to best suit the needs of the District. Beginning the strategic planning process soon will provide the greatest opportunity to impact the 2024-25 school year and beyond.

### *Cost*

The cost for the strategic planning process with MASB facilitating the total process including the completion of the input process and summary, described in this proposal is \$11,147.00 inclusive of all expenses (i.e. mileage, meals, overnights, etc.). Fifty-percent of the total fee is due upon signing of the agreement and the remainder is due at the end of the process.

This proposal is good for 6 months from the date provided.

### *Questions*

For questions about this proposal or the Data-based Strategic Planning Process, please contact:

Debbie Stair  
Assistant Director of Leadership Development  
517-327-5904  
dstair@masb.org



## Okemos Public Schools

### Data-driven Strategic Planning Process

#### AGREEMENT

October 15, 2024

MASB will provide facilitation for a strategic planning process for Okemos Public Schools. The strategic planning process will include:

- Pre-planning/workshop session with Superintendent and Board of Education
- Communication templates for staff, community, press, Strategic Planning Team
- Stakeholder input from board, administrators, teachers, staff, students and community members
- Electronic input option for all stakeholders for whom district has email addresses
- Data report consisting of the following:
  - Student Enrollment and Demographics, Student Learning, Financial, Personnel
  - Trend and comparison data for the district compared to the state and 5 reference districts chosen by the board and superintendent
- Facilitation of a Strategic Planning Team Retreat
- Administrative Implementation Workshop
- Recommendations for plan implementation and board monitoring calendar
- One-page strategic planning document to be used by the board and administrators/staff to track and monitor progress
- Summary Document

Investment: \$11,147.00 inclusive of expenses (lodging, mileage, etc.)

Terms: 50% (\$5,573.50) due upon commencement of work

50% (\$5,573.50) due upon completion

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Okemos Public Schools

\_\_\_\_\_  
Date



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Greg Sieszputowski

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Printed Name

Director, Leadership Development &

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Executive Search Services/MASB

\_\_\_\_\_  
10/15/24

Title/Organization

Date Submitted

