



**Soldwedel Consulting, LLC**  
**104 Greencroft Dr.**  
**Champaign, IL 61821**

**Proposal: Strategic Planning and Management**

**Benjamin School District 25**  
**28W250 St. Charles Rd.**  
**West Chicago, IL 60185**  
**Dr. Patrick McGill, Superintendent**  
[\*\*630 876 7800\*\*](tel:6308767800)  
[\*\*pmcgill@benjamin25.org\*\*](mailto:pmcgill@benjamin25.org)

**Perry D. Soldwedel will serve as the facilitator for all strategic plan work. Perry has been certified as a strategic plan coach and facilitator by the Strategy Management Group/Scorecard Institute. This group helps organizations focus on strategy and improve performance.** It serves healthcare, business, government, and education. In education it serves both K-12 and Higher Education. SMG provides consulting, training and professional certification to professional organizations worldwide related to:

- Strategic Planning
- Balanced Scorecard
- Key Performance Indicators
- Performance Measurement
- Strategic Management

**About Perry Soldwedel**

**Former teacher, principal, curriculum director, assistant superintendent, and Illinois public school superintendent. 1970-2003**

**Director** specializing in systems thinking, strategic planning, data management contracting with the Catalyst for Educational Change. 2003-2023 ( A consortium of school districts in Illinois )

**CEO Soldwedel Consulting LLC.** Coaching, training, and networking educational leaders to live a strategic plan through the Strategy Management Group's 8 Dimensions: Leadership, Culture and Values, Strategic Thinking and Planning, Alignment, Performance Measurement, Performance Management, Process Improvement, and Sustainability. 2005-present

**Certified strategic plan and management facilitator**-Strategy Management Group/Scorecard Institute 2011-present



**Author-** Solution Tree 2009-present: ***The Schoolboard Fieldbook: Leading with Vision and Aligning School Districts as PLCs***

**National Education Advisory Board-** ASQ: American Society for Quality

**Three degrees** from Bradley University, Western Illinois University, and the University of Illinois.

**Adjunct professor** University of Illinois

For complete information about Perry Soldwedel and Soldwedel Consulting LLC please visit the Soldwedel Consulting LLC website:

[www.soldwedelconsultingllc.org](http://www.soldwedelconsultingllc.org)

#### **About Soldwedel Consulting, LLC:**

[www.soldwedelconsultingllc.org](http://www.soldwedelconsultingllc.org)

The **mission** of Soldwedel Consulting, LLC is to assist school districts manage resources efficiently and base strategic plans on validated strategies to achieve organizational goals and improve organizational performance.

The **vision** includes making a difference and positively impacting growth and achievement: Excellence. Expectations. Performance. Every student. Every classroom. Every School. Every District.

#### **Core Values** include:

- All in- *in everything we do*
- Customer success- *when learners succeed, we succeed*
- Do the right thing – *learner focused, continuous improvement*
- Innovate - *take bold and smart risks*
- Put people first - *treat each other with dignity and respect*

#### **The importance of strategic management:**

**There are two basic questions to ask of management: are we doing things right, and are we doing the right things?**

**Operational management** focuses on doing things right, and many tools have been developed to improve this (e.g. TQM, Six Sigma, business process reengineering etc.), including many maturity models. In developing the SMMM, SMG has broadened the concept of “performance” to add **strategic management** concerns, which answer the second question, are we doing the right things. In any organization, it is the strategy, driven from the vision of the leadership, that defines what are the right things. Process improvements alone cannot guarantee that a company will be successful, or that an agency will achieve its mission. ***These two aspects of management – strategic and operational – complement each other, so both must be assessed to determine the organization’s total management capabilities. Both play a significant part of strategic planning. When both are in place there is a great return on the investment of strategic planning.***

**The strategic planning process contains assessments of performance along eight different dimensions of strategic management. All eight dimensions play a significant role in both defining a strategic plan and living it for effective execution and implementation. These dimensions form the basis for ensuring the viability and effectiveness of the strategic plan over the course of its life in the school district. This proposal includes the opportunity to network, share, and learn from other school districts in efforts to live the strategic plan.**

<u>Dimension</u>	<u>Knowledge, Skills, and Dispositions-</u> <u>STRATEGY MANAGEMENT GROUP</u>
<u><b>Leadership and Governance</b></u>	<p><b>Leadership and Governance</b> <i>focuses on the essential question, how do leaders set direction, question assumptions, look at problems in new ways, and create and articulate a vision for the future? Who makes what decision? Who is accountable for behaviors, actions, and performance? Are roles and responsibilities clear?</i></p> <p>Leadership helps you and your team look beyond the tactical day-to-day whirlwind of activities and focus on setting priorities and aligning energy and resources with common goals. Governance provides a framework for managing organizations. It identifies who can make decisions, who has the authority to act on behalf of the organization, and who is accountable for how an organization and its people behave and perform. It usually focuses on purpose, people, processes and performance. In school districts, governance calls for examining the relationships between management, the board of education, unions, and parent organizations. In a broad sense the leaders of those stakeholder groups collaborate to govern the district.</p>
<u><b>Performance Culture &amp; Change Management</b></u>	<p><b>Performance Culture and Change Management</b> <i>examines the essential question, how do you cultivate a healthy organizational climate and culture that enables mission, vision, values and goals to grow and improve?</i> This dimension provides thoughtful applications of change management principles and practices. It promotes engagement in shaping the district, school, team and classroom culture and a mindset for continuous improvement. Change management requires a deep understanding of the human side of change – communication, commitment, culture, capability, and coordination. Understanding change management increases the likelihood of a healthy, productive culture and climate.</p>
<u><b>Strategic Thinking &amp; Planning</b></u>	<p><b>Strategic Thinking and Planning</b> <i>examines the essential question, how do you ensure strategy drives critical thinking and a continuous improvement planning process that is efficient and effective?</i> It is critical to be clear and committed to strategic thinking, use strategic thinking to drive strategic planning, and to ensure a concerted effort to live the strategic plan. Strategic thinking and planning permeates both establishing a strategic plan but even more importantly living and plan. Annually action plans, indicators and targets are established to keep at the forefront the work that will allow the district to achieve its mission, vision, core values and goals.</p>
<u><b>Alignment and Operationalizing Strategy</b></u>	<p><b>Alignment and Operationalizing Strategy</b> <i>centers on the essential question, how do you ensure strategy drives critical thinking and a continuous improvement planning process that is efficient and effective?</i> When a system is well aligned there is synergy and excitement from seeing and understanding the importance of being clear and consistent in our core work and strategy. The opposite of alignment is “chaos”, where leaders, programs and projects are aiming at different goals and there is lack of a common vision, leading to wasted energy, delays, conflict and confusion. Operationalizing a strategy is the process of putting a district’s chosen strategies into action by allocating resources. Operationalizing a strategy enhances alignment by translating high-level strategic goals into concrete, actionable steps that are integrated into day-to-day operations across an organization.</p>
<u><b>Performance Analyzing, Reporting and Informing</b></u>	<p><b>Performance Reporting, Analyzing, and Informing</b> <i>aims to answer the essential question, how do you collect, analyze, and evaluate how “on track” you are in achieving your desired outcomes, standards, goals and/or objectives?</i> Good leaders use meaningful measurements to better understand whether strategies are working, whether programs, projects and services are effective, and whether employees' attention is focused on what matters most to success. It is critical to KNOW YOUR</p>

	IMPACT! Performance reporting, analyzing, and informing becomes doable and more comfortable when leadership, governance, performance culture, change management, strategic thinking and planning, alignment, and operationalizing strategy are at their best!
<b><u>Strategy Projects and Portfolio Management</u></b>	<b>Strategic Project and Portfolio Management</b> <i>focuses on the essential question, how does the district or school create and manage a productive and efficient work environment where students and staff use metrics and data effectively to fulfill their full potential to achieve performance success?</i> It is one thing to collect data, it is another to use it effectively. Performance management deals with the degree to which performance metrics are used to make great decisions. The research reveals that change, though filled with opportunity, almost always presents challenges for teams. Change is often associated with having an adverse impact on key performance metrics. When disruption occurs, school districts often lean on their project teams' ability to adapt and execute at the same pace and level of excellence. Frequent change is creating a sense of fatigue and overwhelm for project teams. What strategies will help teams confidentially adapt and move forward?
<b><u>Process Improvement</u></b>	<b>Process Improvement</b> <i>examines the essential question of which key processes should be in everyone's portfolio? (Doing the RIGHT things)</i> This requires input from the strategy, which informs the allocation of resources for planning improvements of the most strategically important processes in the near term and long term. This guides professional development, mentoring and induction, and coaching.
<b><u>Sustainability</u></b>	<b>Sustainability</b> <i>centers on the essential question, how does strategic management of the first 7 Dimensions lead to sustainability and place the district or school a journey of continuous learning and improvement?</i> Sustainability happens when the district, schools, teams and classrooms maintain their focus on strategic vision, plans and initiatives. Sustainability happens when key processes are not person-dependent but are system-dependent.

The following chart documents the components, purpose, time, costs and format of the Strategic Planning Process.

Meeting	Purpose	Time/ Cost	Suggested Format
<b>Readiness 1: Developing clarity and understanding of the strategic planning process, roles, and responsibilities.</b>	<b>Overview of the process for Core Leaders:</b> Leaders learn about strategic management, the history of the strategic planning process, components of the process, selection of team members, and conducting an environmental scan. Leaders learn about communicating the process to others, so they know what it ahead.	.5 day \$1200	Virtual or in person TBD
<b>Readiness 2: Supporting district leaders prepare data and information to assist the plan team understand current district performance compared to past and to other districts.</b>	<b>Preparing the data for the strategic plan team:</b> Leaders learn about the preparation of environmental scan data and key performance indicators and measures. They prepare qualitative and quantitative data an information to share with the plan team about the district's performance. They learn about preparing for the student achievement report. preparing for the culture and climate report (Learning environment and Working environment), and preparing for the resources report (Finance, facilities, and technology).	.5 day \$1200	Virtual or In person TBD

Other Readiness: Other readiness activities	Other readiness activities may be agreed to by both parties as identifies in Readines 1 and Readiness 2 activities	.5 day \$1200 or \$300 per hour	Virtual or In person TBD
Orientation: Understanding the plan team's roles and responsibilities and the steps in the planning process. This two-hour session is virtual.	<b>First Meeting (virtual) of the plan team:</b> Team meets each other and answers the question, <b>"Who is in the room and what are we charged to do?"</b> Team learns about the strategic planning process, roles, responsibilities, and timelines. Team previews the three big meetings. Team learns about the current strategic plan. Team understands the importance of data in the process. Team understands the responsibilities for representing and sharing with other stakeholders.	.5 day \$1200	Virtual TBD October
Data Retreat: Identifying the strengths, weaknesses, opportunities, and threats of current district performance. This six-hour session is face-to-face.	<b>Second Meeting (face-to-face) of the plan team:</b> Team learns the process used to answer the important question of, <b>"Where are we now?"</b> By the end of the session the team identifies the strengths, weaknesses, opportunities, and threats (SWOT) of the district. This session creates a shared understanding among all team members of the current performance of the district compared to the past and to others. Trend, demographic, comparative, and cohort data are shared.	1.0 day \$2400	Face to Face TBD October
SWOT Analysis and Feedback: Documenting collective district strengths, weaknesses, opportunities, and threats. Seeking feedback from stakeholders not on the team about the team's thinking.	Facilitator will take the team's work and draft a consensus SWOT analysis and provide consensus content to the district to conduct stakeholder feedback. The district will provide opportunities for stakeholders to react to the team's findings. They will have an opportunity to identify additional strengths, weaknesses, opportunities, and threats not identified by the team. The team will review this feedback and revise/refine the SWOT Analysis at the next session.	.5 day \$1200	TBD October
Vision Retreat: Envisioning a 2030 mission, vision, portraits, and core values to capture a preferred future for the district. This six-hour session is face-to-face.	<b>Third Meeting (face-to-face) of the plan team:</b> Team learns the process used to answer the important question of, <b>"Where do we want to be?"</b> By the end of the session the team updates the mission, vision, portraits (Graduate, Educator, and System), and core values of the district. This session creates a shared understanding among all team members of the preferred future of the district compared to the present.	1.0 day \$2400	Face to Face TBD November
Preferred Future Statement and Feedback: Documenting collective mission, vision, portraits, and core values Seeking feedback from stakeholders not on	Facilitator will take the team's work and draft a consensus Preferred Future Statement and provide content to the district to conduct student and staff feedback. The district will provide opportunities for stakeholders to react to the team's findings. They will have an opportunity to identify additional concepts for mission, vision, portraits and core values The team will review this feedback and revise/refine the Preferred Future Statement at the next session.	.5 day \$1200	TBD November



the team about the team's thinking.			
Setting Direction Retreat: Updating district long-range goals, indicators, and measures and identifying the critical work the district must achieve over the life of the plan to achieve those goals and accomplish the mission and vision. This six-hour session is face-to-face.	<b>Fourth Meeting (face-to-face) of the plan team:</b> Team learns the process used to answer the important question of, <b>"How will we get from where we are to where we want to be?"</b> By the end of the session the team updates the current long-range goals/priorities of the district. It identifies critical strategies for each goal that need immediate attention to improve the performance of the district. It also identifies and makes suggestions for key performance indicators, measures and targets to monitor, track and report long-range goal and strategy progress. This session creates a shared understanding among all team members of the future focus and direction of the district.	1.0 day \$2400	Face to Face TBD December or January
Draft of Strategic Plan and Feedback Documenting the consensus draft of the strategic plan. Seeking feedback from stakeholders not on the team about the team's thinking.	Facilitator will take the team's work and produce a consensus draft of the strategic plan and provide content to the district to conduct stakeholder feedback. The district will provide opportunities for stakeholders to react to the team's draft of the strategic plan. They will have an opportunity to identify additional concepts for mission, vision, portraits, core values, long range goals, and critical strategies. The team will review this feedback and revise/refine the draft of the strategic plan at the final session.	.5 day \$1200	TBD December or January
Final Meeting: Reflecting on all feedback, the team will have a final opportunity to document its recommendation. This two-hour session is virtual.	<b>Fifth (Virtual) and Final Meeting of the Plan Team:</b> Strategic Plan Team's fifth and final meeting to share stakeholder feedback on the draft of the strategic plan to make final adjustments leading to the recommendation to the superintendent. The final meeting will answer the question, <b>"What will we recommend to the Board of Education?"</b> <i>The team will also understand the process and timeline leading to Board of Education approval.</i>	.5 day \$1200	Virtual TBD February
Recommendation: The facilitator will prepare the final consensus recommendation.	Facilitator will take team's work and produce all deliverables to the district.	.5 day \$1200	TBD February
Living the Plan: After board approval, training will begin in the areas of first year action plans for identified goals and strategies and in the development of a scorecard/dashboard system to track progress, set annual	<b>Following the approval of the strategic plan, the core team along with Champions of each goal team will participate in two training sessions:</b>  <b>Action Plan Training:</b> Team leaders learn the action planning process to answer the question, <b>"What will we do differently for the year to improve our performance?"</b> Goal action team leaders (Champions) and others will learn of the consistent action planning process for all goals and strategies. The Plan-Do-Study-Act process is used as the framework for developing annual action plans. The training includes clarity in	.5 day \$1200	Face-to-Face TBD March or April

targets, and communicate impact to district stakeholders.	<p>the process, selecting goal action team members, roles and responsibilities of goal team members, and the use of a consistent action plan template for shared understanding and simplicity. The roles and responsibilities of goal champions are clarified.</p> <p><b>Scorecard/Dashboard Training:</b> Goal action team leaders (Champions) and others will learn of the difference between a scorecard and a dashboard for tracking. These leaders will ensure data and other information is collected, monitored, and reported to answer the question, <b>“How will we know we are making an impact and what will we do if we are not?”</b> monitoring and reporting goal and strategy growth and improvement. They will learn about leading and lagging indicators for tracking impact. They will develop a draft of all KPIs. They will learn about the 3-cycle check-in process and the importance of communicating impact with all stakeholders.</p>	.5 day \$1200	
<b>TOTAL</b>	<p><b>3 days @ \$2400; 9 half days @ \$1200</b></p> <p><b>Readiness \$2,400</b></p> <p><b>Strategic Planning \$13,200</b></p> <p><b>Living the Plan \$2,400</b></p>	<b>\$18,000</b>	

Soldwedel Consulting, LLC will provide to the district a W-9 and bill the district for services at the end of the following months: August, Sept, Oct, Nov, Dec, Jan, Feb, Mar, and Apr. It expects payment within 30 days of receipt of each invoice. Dates listed may be changed by mutual agreement. Notification for changed agreed upon dates need to be made 48 hours in advance. Full day or half day rates include all facilitator preparation work and time.

**Note:** In addition, the district is responsible for facilities, travel, supplies, and zoom assistance.

- ☐ Facilities would include strategic plan team meeting space to adequately house the strategic plan team.
- ☐ Travel would include transportation to and from the district (mileage at the state rate) for all face-to-face meetings as well as tolls, lodging and meals if necessary.
- ☐ Supplies would include all things necessary to conduct team activities (posters, folders, paper, post it notes, markers, tape, etc.)
- ☐ Addition services mutually agreed to will be at a cost of \$2400 per day or \$1200 half day.
- ☐ The district will be responsible for administering and collection of feedback data.
- ☐ The district will provide a zoom expert to assist the facilitator for all virtual sessions.
- ☐ The district will provide time to work with the facilitator to prepare for each session of the plan team. A Google folder will house all strategic plan documents, communications, and products.
- ☐ The district will provide space on the website to house all strategic plan documents, communications, and products.

**Perry D. Soldwedel**  
**Owner**  
**June 1, 2025**

**Patrick McGill**  
**Superintendent**  
**June 1, 2025**