

1/29/2023

Crosslake Community School

Strategic Planning Request for Proposal

INspiring SIGHT

*"Organizations with the desire to evolve, grow & take risks,
view INspiring SIGHT as an asset because
we ask the questions that help you source your own answers."*

INspiring SIGHT

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“Our sweet spot nonprofits, associations, and small businesses”

EXECUTIVE SUMMARY

This proposal is in response to a request sent to me by Holly Amaya, Director of Online Learning, for Crosslake Community School (CCS). CCS is seeking an experienced professional in strategic planning to facilitate the development of a long-range strategic plan. Driving the need for a new strategic planning process is the significant increase in CCS enrollment and multiple leadership transitions since the previous CCS strategic plan was created. Historically, consultants are seen as experts and advice givers. Where INspiring SIGHT differs, is that we believe the client has the answers & it is our job to be experts at asking the powerful questions & creating safe spaces so your organization & community can uncover and source their own answers, creating buy-in and ownership for your process.

Scope of Work

Environmental Scanning-February 20 to May

- ~ Stakeholder identification – strategic design meeting
- ~ Board, director, and partner interviews – 21 interviews by phone
- ~ Four focus groups: 2 for seat-based staff/teachers, 2 for online teachers/staff
- ~ Community listening session, in-person
- ~ Assessment of current plan/priorities
- ~ Stakeholder synthesis and report writing

Strategic Planning Retreat- June to August

- ~ Board & leadership team retreat – Two days, in-person
- ~ Share a synthesis of all stakeholder feedback organized into trends, themes, gaps, weaknesses, strengths, opportunities, risks, priority investments, strategic priorities & evaluation of decision-making processes to be considered in establishing priorities; surface issues that might obstruct the implementation of a new plan
- ~ Micro-learning on governance vs. management
- ~ Micro-learning on the anatomy of a strategic plan
- ~ Facilitated discussions throughout including but not limited strategic juncture exercise
- ~ Strategic debrief meeting with leadership team 2-weeks to finalize draft plan created during the retreat
- ~ Final report generation of the entire process & results including stakeholder feedback

Each scope area includes the following components:

- ~ Administration and coordination between INspiring SIGHT staff and CCS staff
- ~ Design time for creating questions, flow, and facilitated processes
- ~ Facilitation
- ~ Synthesis of information
- ~ Report writing

Strategic planning should energize, build engagement, and leave your entire organization knowing they can handle whatever comes their way. INspiring SIGHT's process helps organizations eliminate the barriers referred to in the [Five Reasons Strategic Plans Fail to Be Strategic](#). INspiring SIGHT's customized one-page ©Strategy Tree utilizes a tree metaphor to help organizations view their strategic plan as a living process which requires nurturing and attention. We teach our clients how to utilize the ©Strategy Tree as a litmus test for all decision-making so they routinely assess for progress and alignment with their mission and strategic priorities (see addendum, page 10).

To ensure internal & external participants in the process are clear about their role, we set expectations around the role of participation from the start. We utilize the International Association of Public Participation (IAP2) spectrum, (addendum pg. 11) which was designed to create transparency when working with the public and internal stakeholders, The IAP2 includes five levels of participation: Inform, Consult, Involve, Collaborate, and Empower. In consultation with CCS staff, we would determine which level of participation stakeholder groups fall into.

Scope Components

Environmental Scanning - February 20 to May 2023

- ~ Strategic Design Meeting-stakeholder identification – strategic design meeting, virtual
- ~ Board, director, and partner interviews – 21 interviews by phone
- ~ Four focus groups: 2 for seat-based staff/teachers, 2 for online teachers/staff
- ~ Community listening session, in-person
- ~ Review & assessment of existing documents such as current strategic plan, implementation plan board documents etc.
- ~ Assessment of current plan/priorities
- ~ Stakeholder synthesis and report writing

An Environmental Scan is used to prepare a group for strategic planning by identifying and monitoring factors internal and external to the organization that may impact its long-term viability. During this step we are attempting to develop the “big picture” of the organization within the community(ies) it operates in. Environmental scans also surface relevant factual data, community history, accomplishments, trends, culture, and subjective data such as customer, community, or potential stakeholder perceptions and experiences. We’ve identified the environmental scanning activities which we estimate to produce the best results for your organizational structure.

Environmental scans take place in many forms such as individual interviews, focus groups, surveys, and a number of facilitated participatory processes. Most importantly, stakeholders need an opportunity to have their voices heard and feel valued while decision-makers benefit from rich stakeholder input in order to make relevant decisions. We utilize the International Association of Public Participation (IAP2, pg. 11).

In reference to the four focus groups with district staff, we prefer to conduct those in-person but can also facilitate them virtually. If we could align the timing so they could be scheduled during the same time frame as when we are in Crosslake for the community listening session, that would be our preference and it would save on travel expenses.

During our initial strategic design meeting, we will collaboratively determine with your team who among your key stakeholders to solicit input from and what you most need to understand from each group. We will gain understanding about your needs, what you want to walk away with, what success looks like, and whose input the board absolutely needs to consider for making relevant decisions. These decisions will be finalized after discussion with your team should we be awarded the contract. This discussion helps us finalize the exact scope and cost of the project.

*“Mary Kay’s was the best strategic planning process I have ever been in.
I never felt pulled or rushed. She allowed us to change things as we went along.”
30,000 Member Association Board Member*

Strategic Planning Retreat and Report Generation - June to August 2023

- ~ Board & leadership team retreat – Two days, in-person
- ~ Delivery of a synthesized report of all stakeholder input -- setting the stage for discussion & decision-making. Stakeholder feedback is organized into trends, themes, gaps, weaknesses, strengths, opportunities, risks, priority investments, strategic priorities
- ~ Micro-learning on governance vs. management
- ~ Micro-learning on the anatomy of a strategic plan including the role & purpose of values, vision, mission, & strategic directions & vision metrics
- ~ Facilitated discussions throughout including strategic juncture exercise
- ~ Determine, values, vision, mission, three-five strategic directions, vision metrics, 3-year goals
- ~ Alignment of existing activities with newly determined strategic directions & alignment testing of the draft plan
- ~ Establish vision metrics for each of the strategic directions
- ~ Establish 3-year goals for each of the strategic directions
- ~ Strategic debrief meeting with leadership team two weeks following retreat to finalize before sending to Board of Directors for approval

In the addendum section on page 10, we've provided an example of INspiring SIGHT's proprietary one-page strategic plan. At the end of our work together, CCS will walk-away with a completed CCS ©Strategy Tree. The ©Strategy Tree was designed to help organizations visualize their strategic plan as a living, breathing document that requires attention and nurturing in order to grow and flourish. I will teach you how to utilize the tree metaphor and ask the right questions to stay in alignment with your plan.

"I walked away from the strategic planning process Mary Kay facilitated, focused, refreshed and with a solid vision for our work."

Executive Director, Statewide organization

Retreat Outcome & Final Report, September 2023

CCS will receive a customized and completed ©Strategy Tree which includes values, vision, mission, strategic directions, vision metrics and three-year goals for each strategic direction. Additionally, you will receive a final report outlining the process, participants, results, and recommendations. The report will include an outline of the process your organization went through, a summary of stakeholder feedback, the names, and titles of all who participated in interviews, and environmental scanning activities, my review of your existing documents, summary of decisions made, the strategic plan, the implementation plan and template, next steps, and recommendations. The report will be submitted to you within 20-days following the final retreat date.

Crosslake Community School Responsibilities:

- ~ Providing a key contact for INspiring SIGHT
- ~ Any requested background information for INspiring SIGHT's review
- ~ Current planning and strategic documents which guide the organization
- ~ Board, staff, and stakeholder email and phone contact lists for individual interviews
- ~ Coordination of any space, logistics, & promotional activities of any facilitated sessions
- ~ Printing of any required handouts for group meetings or training
- ~ Technical assistance if on Zoom sessions. Request this is someone other than staff or board who plan to participate in the discussion. This person is responsible for setting up break out rooms, managing chat room and letting attendees back-into the session if they have technical difficulties, etc.
- ~ Communicating directly to members, staff, stakeholder, & board about the process, retreat details & supporting interview scheduling with Inspiring SIGHT

Meeting space requirements:

- ~ Projector & screen
- ~ *Large whiteboard(s), (wall size whiteboards are ideal) or two large blank walls (8ft in length)
- ~ Three easels & three easel size sticky paper pads
- ~ Tables in a U-shape for strategic planning retreat, space to move around
- ~ WIFI access

Proposed Timeline

We outlined what we believe to be a doable timeline but it will come down to the ease and availability of scheduling the focus groups and retreats with your board and staff. Such factors may shift the timeline by one to three-months. Our approach is to schedule the retreat session first and then reverse engineer the timing of everything else so that we have the appropriate time to synthesize and complete the steps in between. Should we receive the contract, we would discuss this during our initial strategic design and planning meeting. Our budget is estimated on the information we had at the time in the RFP. We made some assumptions based on the overall scope and our experience of what will be required for creating a meaningful strategic plan that is transparent, and inclusive of your stakeholder base. Together with your leadership team, we will refine the final scope together before signing the contract.

All information gathering/environmental scanning activities must be complete 3-4 weeks in advance of any facilitated retreats to allow time for synthesis and facilitation design.

Budget Narrative

We like to remind potential clients that a proposal is not final. If you like our experience and what we have to offer but there are components you do not understand. Let us have a conversation before you decide about whether or not we are a good match. Our proposal is designed utilizing the wisdom gained from our robust experience with strategic planning and our best estimates based on limited information at the time of proposal writing.

Your organization will be responsible for any printed materials necessary for the board, staff or for any facilitated meetings along with the strategic planning retreat.

INspiring SIGHT will cover their own mileage expense but will charge for drive time if it is over 45 minutes or outside of the 7-County Metro.

We have written lodging, travel time and meal expenses into the budget in alignment with our proposal. These items will be billed only on actual expenses.

Each of the core scope phases includes our time for the following activities:

- ~ Administration and coordination between Inspiring SIGHT staff and CCS staff and board
- ~ Design time for creating questions, flow, facilitated processes
- ~ Facilitation
- ~ Synthesis of information
- ~ Report writing
- ~ Set-up time

Anticipated Budget

Environmental Scanning - February to May 2023	
Strategic Design Meeting – Virtual	
~ Stakeholder identification & Scope Assessment with leadership team – up to 4 hours	\$0
Stakeholder Interviews - Phone	
<ul style="list-style-type: none"> ~ Interview design ~ All interviews by phone; 45 min each <ul style="list-style-type: none"> Board x 16 Partner interviews each x 3 Director interviews x 2 ~ Interview synthesis ~ Admin/coordination ~ Report writing 	\$4525
Focus groups – Four, Virtual	
<ul style="list-style-type: none"> ~ Focus group design x 4 focus groups; 2 hours each ~ Facilitation of x 4 focus groups x 2 facilitators; <ul style="list-style-type: none"> group 1 -seat-based teachers/staff; min. 6, max 19 group 2 - seat-based teachers/staff; min. 6, max 19 group 3 - online teachers/staff; min. 6, max 19 group 4 - online teachers/staff; min. 6, max 19 ~ Focus group synthesis x 4 focus group ~ Report writing ~ Admin-survey/focus group coordination ~ Assessment of current plan/priorities ~ Stakeholder synthesis 	\$5450
Community Listening Session – In-person	
<ul style="list-style-type: none"> ~ Listening session design ~ Facilitation of a 2-hour community listening session with parents, community, and students ~ Session synthesis ~ Admin- coordination ~ Report writing 	\$2325
Environmental Scanning Total	\$12,300
Strategic Planning Retreat	
<ul style="list-style-type: none"> ~ Board & leadership team retreat – Two days, in-person ~ Share a synthesis of all stakeholder feedback organized into trends, themes, gaps, weaknesses, strengths, opportunities, risks, priority investments, strategic priorities & evaluation of decision-making processes to be considered in establishing priorities; and surfacing issues that might obstruct the implementation of a new plan ~ Micro-learning on governance vs. management ~ Micro-learning on the anatomy of a strategic plan ~ Facilitated discussions throughout ~ Strategic debrief meeting with leadership team two weeks following retreat ~ Final report generation of the entire process including stakeholder feedback 	\$9825
Strategic Planning Retreat TOTAL	\$9825
TOTAL PROJECT	
	\$22,125
Travel, Lodging, Meals (estimates)	
<ul style="list-style-type: none"> ~ 1 Round trip to Crosslake (community listening session) x 2 ppl x 50\$ x 10hr.= \$500 (lodging depends on timing) ~ 1 Round trip to Crosslake (strategic planning retreat) x 1 person x \$50 hr. x 5 hrs. = \$250 ~ 2 nights lodging x 1 person (strategic planning retreat) – anticipate CCS will book rooms 	\$750

Addendums

About the team



INspiring SIGHT is a coaching and strategy firm powered by 30-years of multi-sector-interdisciplinary experience on the front lines, in the boardroom, and in leadership. Owner, Mary Kay Delvo, understands that CEOs think differently than employees, conflict means something is trying to emerge and that systems hold their own wisdom and intelligence.

Clients respond well to her approach which combines humor, transparency, and a little dose of reality useful for challenging status quo thinking, expanding perspectives, dislodging stuck positions, and creating clarity. She helps those she works with have crucial conversations where everyone feels heard, open dialogue is welcome, and it is safe to surface issues. Her work is backed by a strong referral base, professional-level training, and decades of multi-sector experiences in-the trenches, and in leadership. INspiring SIGHT believes the client always has the solution and witnesses first-hand that mindset is the most common barrier to finding solutions.

Key-ways INspiring SIGHT supports executives, teams, and organizations

- ~ Facilitation of intentional and accountable conversations
- ~ Development of a deeper understanding of team and system dynamics
- ~ Alignment of differing viewpoints to positively impact the collective whole
- ~ Client support through change and development initiatives

The firms' sector experience is broad and includes small businesses, nonprofits, county and state governmental agencies, associations, public systems and public secondary and higher education. This experience is confirmed by a strong referral base, professional-level training, and decades of multi-sector experiences in-the trenches, and in leadership. This, coupled with extensive training and practice gives Mary Kay an edge as a facilitator, strategist, and professionally trained coach. For more on Mary Kay's background, to www.inspiringsight.com and www.linkedin.com/in/mkdelvo.

Board of Education Experience

Board of Education, Fridley Independent School District #14	Eight years
Board of Education for Intermediate School District #916	Three years
Association of Metropolitan School Districts Board	Six years
MSBA legislative representative for Fridley School District	Six years
Board liaison for four bargaining units, teachers, clerical, nutritional services, and custodians.	

In addition to Mary Kay, INspiring SIGHT has part-time support that is the magic behind the scenes. We draw from Mary Kay's large network of professionals as needed for specific projects. This allows us to bring in the right expertise for matching our clients' unique needs. Mary Kay Delvo will be the principle for the project.



Deborah Gleason is an analyst and has a unique approach to manipulating and cleaning data, creating actionable reports, developing systems and processes, streamlining high-level analyses, and documenting it to the hilt. Deborah is actively engaged with nonprofits as a way to give back to her community. She is passionate about accessibility and ensures that lens is always on INspiring SIGHT's work. Nonprofit involvement has included Minnesota State Academy for the Blind Foundation, WeCo Accessibility Services Advisory Board Chair, the advisory board for Girls Are Powerful Mentorship Program, MN Statewide Independent Living, Council and Sexual Violence Center MN Board. Deborah owns [The Information Tamer](#), an analysis, and system design firm and INspiring SIGHT hires her to take care of her client's needs in the area of analysis and data.

Capacity

As independent business owners, Mary Kay and Deborah have the capacity to choose the projects they are involved in and how their time is used. In 2023, both have the bandwidth to take on this project provided ACLU’s stated selection process and general timeline, as outlined in the RFP, remain on track within a couple of weeks to a month on either side of the projects target dates.

Mary Kay will be the principle on this project, leading facilitation, presentations, and board interviews. Deborah will co-facilitate and lead the stakeholder feedback analysis, synthesis, and report writing. Deborah will also coordinate administrative functions such as scheduling of focus groups, interviews etc.

Relevant Experience

Since starting IS, Mary Kay has facilitated over 50 strategic planning and implementation processes. And today, more than 50% of our work is with organizations around strategy creation, coaching and planning.

Public Education Related Projects

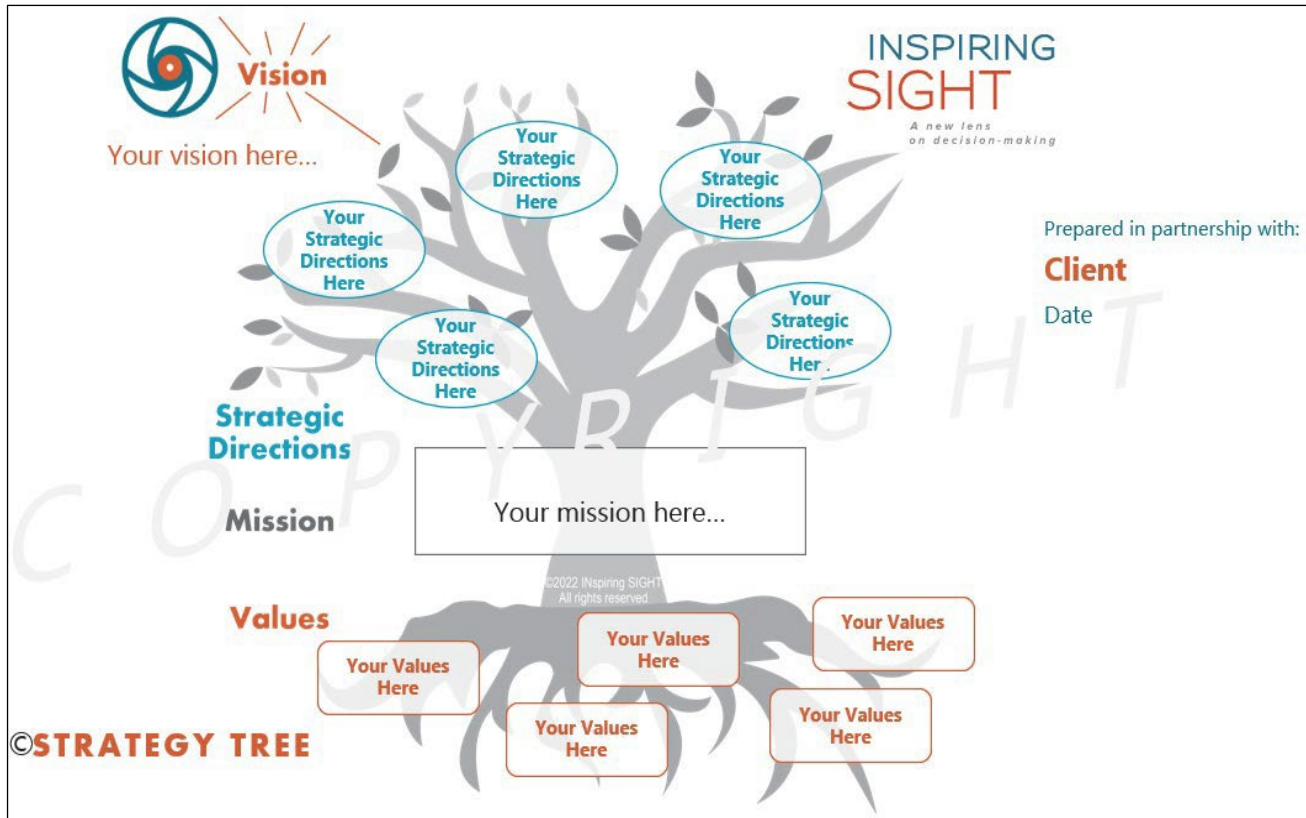
Minnesota Association of School Business Officers (MASBO)	Leadership Development Academy
Minneapolis Public Schools Board of Directors	Board development & culture
Minnesota School Board Association	Strategic planning
Minnesota State/Minnesota Department of Education	Strategic planning, facilitation, public listening
Perkins V Statewide Funding Strategy	Coaching, stakeholder synthesis
Hennepin West Career & Technical Education (CTE) Consortia	Coaching, facilitation & implementation planning
Minnesota Association of Career & Technical Educators	Strategic planning

Strategic planning clients

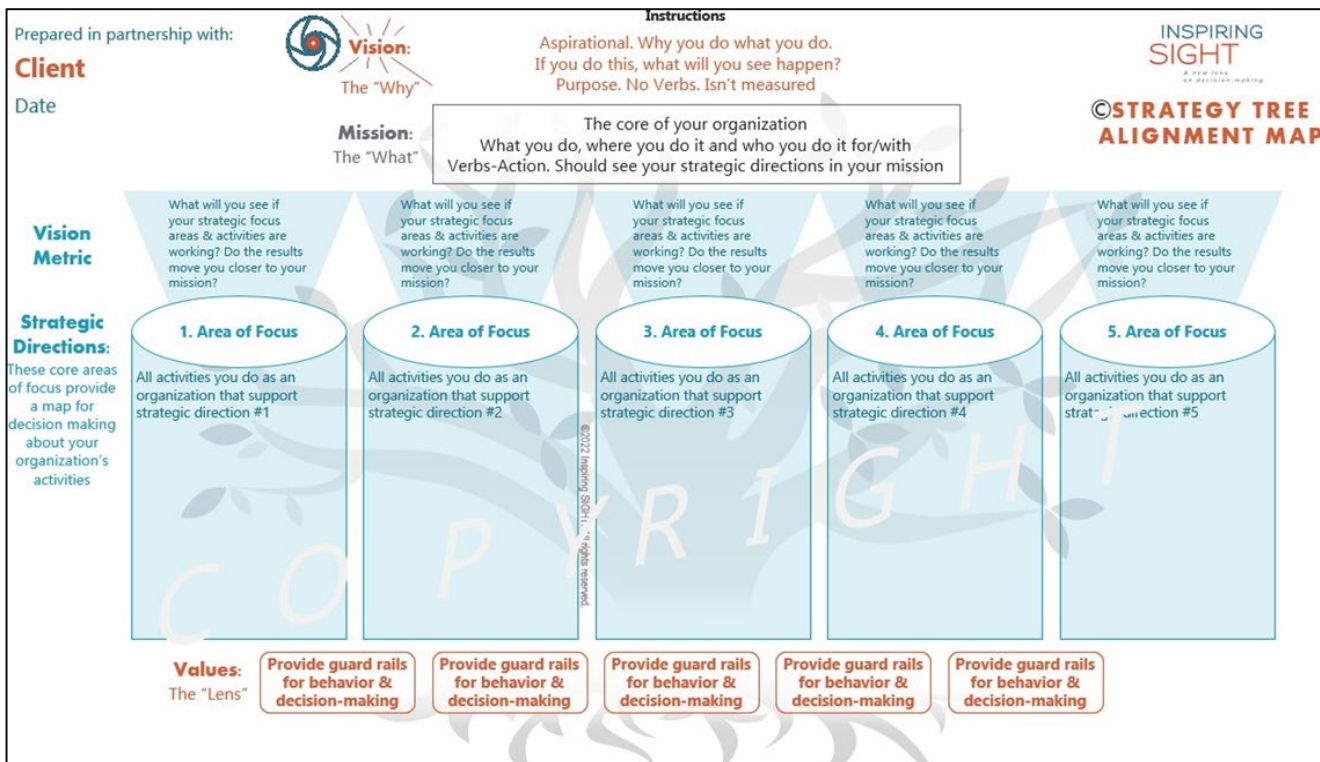
Associations North	Farm America
International Coaching Federation – Minnesota Chapter	K2 and Company
League of Women Voters, Minnesota	MN Agricultural Educators Leadership Council
Minnesota Association of Career and Technical Educators	Minnesota Coalition Against Sexual Assault
Minnesota Farm Bureau Federation	Minnesota School Board Association
National Professional Agricultural Student Organization	
Partners for Affordable Housing	Sexual Violence Center
The Legacy of Angels Foundation	University of MN Masonic Cancer Center
Minnesota State College & Universities / Minnesota Department of Education	

“Mary Kay’s strategic planning process is the best I have ever experienced. We accomplished everything we wanted to in one day and she built complete buy-in of the entire board and staff.”

©Strategy Tree



©Strategy Tree Alignment Map




International Association for Public Participation (iap2)

IAP2 Spectrum of Public Participation



IAP2 developed The Spectrum of Public Participation to help groups define the public's role in any public engagement process. The Spectrum is quickly becoming an international standard.

		INCREASING IMPACT ON THE DECISION 				
		INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
PUBLIC PARTICIPATION GOAL		To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
	PROMISE TO THE PUBLIC	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

©International association for public participation. www.iap2.org

Facilitation Methods

Mary Kay is trained in a variety of facilitation methods such as Technology of Participation (ToP), which is a consensus-based approach that ensures all voices are heard and understood throughout the process. The table below is an overview of a variety of methods we have to draw from.

Strategies and Methods for Facilitation			
Inclusion of Voice <i>(Consult)</i>	Context & Trends <i>(Consult)</i>	Prioritization/Implementation <i>(collaboration)</i>	Consensus Building <i>(collaboration)</i>
Fears & Hopes Invites perspective sharing & builds a common understanding	Contextual Landscape 4 paradigms	Preserve, Change & Create Group identifies what's working well, what's not, & what to change	Fist to Five Quick way to visibly test consensus & discuss options in a group
Snow Cards Brainstorming & clustering	Best/Worst Case Scenarios Get the group unstuck & reach agreement	What-Who-When Used to develop a plan & think through all the details to accomplish it. Used when many steps & many people involved	Multi-Voting Priority ranking tool that enables group to quickly sort through long list of ideas
Criteria Listing Determines focused criteria based on the concerns voiced in the group	Open Space Technology Invites space for deeply & creatively engaging on issues of importance	Criterion Grid Useful for deciding which options are best for your purposes. Makes it easy to compare many options	Spotlight Cards Indicates agreement, hesitation, or disagreement without a decision being proposed
Brainstorming Gathers a full range of ideas b4 decision-making	World Café Safe space for providing feedback, engages all	Prioritization Matrix Helps to prioritize lists of 6-12 items. Focuses group on one decision at a time	
One Word In a new group, helps to identify specific strengths of the group & get to know each other	Trends Conversations Brief overview of trends to set context and provide brief history for helping everyone start from the same place	Wall of Wonder History based, all about facts, how to "same page" a group when growing, pivoting, or expanding	
Open Space Technology Invites space for deeply & creatively engaging on issues of importance	Situation Assessment - quick & extended SWOT with past, present, future components, can be used in focus groups	Strategic Juncture Analysis Leads to consensus, creates an expanded shared perspective, unearths truths, sets stage for planning	
World Café Safe space for providing feedback, engages all	Cooperative Study of Quantitative Data Group interpretation of data that neutralizes the loudest voices & builds group buy-in for asking better follow-up questions based on the data	WAVE Metaphor Uncovers emerging trends based on past trends – helps to see implications and design next steps	
@EquityInsights Uncovers barriers to equity within systems with a set of key questions for planners at the front end of a process	Social Triangle Shows what is out of balance. Helps dig into culture, good for boards on an annual basis. Helps you determine, how, what & why		