



NORTH SLOPE BOROUGH SCHOOL DISTRICT - FY2025-2030 5-YEAR STRATEGIC PLAN DEVELOPMENT (FY2024 EXTENSION)

OnStrategy is pleased to submit the following proposal to the North Slope Borough School District to facilitate the development of the new 5-year Strategic Plan (FY2025-2030). Specifically, this estimate includes the following work for the period of **January 2024 through June 2024**.

Expected Outcomes

As part of continued efforts started at previous retreats in 2022 and 2023, OnStrategy will work with the Board and Planning Team to establish the direction and governance of the North Slope Borough School District. Outcomes to include:

- New 5-Year Strategic Plan (FY2025-FY2030), effective July 1, 2024.
- Governance and policy to embed the Strategic Plan.

Engagement Approach

Phase 1: Build the Strategic Plan – April Onsite Sessions

- **Pre-Planning:** Conduct a series of Pre-Planning Workshops with each Goal Team to lay the foundation and groundwork for Onsite Planning. Collect data, develop the workspace, and prepare for April Sessions. *(February-March 2024)*
- **OnSite Planning Sessions:** Facilitate a 3-day series of onsite Strategic Planning Workshops to build out the Strategic Plan by Goal Area. OnStrategy will provide 2 facilitators for these sessions. *(April 1-3, 2024)*
- **Board Input:** Facilitate a virtual working session with the Board to gather input, answer clarifying questions, and confirm the strategic direction of the working draft plan. *(April 24, 2024)*

Deliverable: Draft Strategic Plan v1 *(May 2024)*

Phase 2: Finalize the Strategic Plan – Summer Board Retreat

- **Board Retreat Prep:** Build out the Draft Strategic Plan and prepare for the Summer Board Retreat. *(May 2024)*
- **Summer Board Retreat:** Facilitate onsite a 1-day Board Retreat to refine and finalize the FY2025-FY2030 Strategic Plan. OnStrategy will provide two facilitators. *(May 29, 2024)*
- **Communication Document (Optional):** Design-enhanced Communication Document/Strategic Plan Overview

Deliverable: New 5-Year Strategic Plan/Roadmap for FY2025-FY2030 *(June 2024)*



Next Steps – FY2024/25

Phase 3: Implement the Plan

**Note: Not part of this scope/work to commence July 1 with the next contract*

- **Board Approval:** Submit the plan for Board Approval. *(August 2024)*
- **Plan Rollout:** Communication and rollout of the new 5-Year Plan. *(August 2024)*
- **Set Up the Execution Cycle:** Provide the structure for annual planning and implementation management. *(August - September 2024)*
- **Support the Execution Cycle:** Support the implementation process through ongoing check-ins at the Department and District level. *(September 2024 - July 2025)*
- **Bi-Annual Reporting:** Support the Bi-Annual Reporting process to ensure the Board and other Key Stakeholders stay informed about the progress of the plan and success indicators.

Project Schedule

Activity	Approach	Date
Phase 0: Plan the Plan		
Design the process, approach and schedule		Jan-Feb
December Retreat Follow-up	Notes & Communication to Retreat Participants	By Jan 15
Finalize Scope of Work, Project Schedule & Budget	OnStrategy	Week of Feb 5
Scope of Work & Budget Approval	Board Meeting	Submit to Board Feb 15
Confirm Planning Participants & Session Dates	OnStrategy w/Planning Team	By Feb 9
Submit materials for 2/15 Board Packet	OnStrategy	By Feb 9
Board Working Session (Retreat Re-cap & Next Steps)	Board Meeting	Feb 15
Deliverables: Approved Scope of Work; Schedule; Plan Framework & Approach Outline		Feb 15



Phase 1: Build the Plan (April OnSite Sessions)		
Kick-Off w/Planning Team		Feb
Rollout the Planning Process, Approach & Timeline. Confirm Goal Team participants.	Virtual meeting w/all planning participants (all) (60 min)	Feb 16
Create Planning Workspace (One per Goal Team)	OnStrategy	Done by Feb 23
Identify Data Needed to Inform Planning (per goal area)	OnStrategy Pre-Work	Done by Feb 23
Setup the Structure for Department Action Plans	OnStrategy Pre-Work + Present Structure at Goal Team Workshop	Done by Feb 23
Hold a pre-planning workshop w/ each goal team to confirm what we have and what data is needed.	OnStrategy Workshop w/Each Goal Team (60-90 min per Team x 8)	Week of Feb 26
Prep for Planning Sessions		Feb-Mar
Collect & Assimilate Planning Data	NSBSD Goal Teams & OnStrategy	March 1 - March 22
Prep for Planning Workshops	OnStrategy	Week of March 25
Working Sessions by Goal	Onsite	April
Planning Session per Goal Team	On site Working Sessions (3 Days On Site)	April 1-3
FY24/25 Annual Plan (Department Action Plans)	Begin to build and/or set up the structure for follow-up work	April
Phase 2: Finalize the Plan (Summer Board Retreat)		
Finalize the Plan		April-June
Build & Refine the Plan / Fill in Gaps	OnStrategy w/Goal Teams	April
Board Input: Executive overview for the Board + Clarifying Questions	Board Work Session (60-90 min Virtual)	April 24th
Prep for Board Retreat	OnStrategy	May
Board Retreat: Present Draft Plan to Board (Planning Document) to Finalize & Refine w/Board	Board Retreat (OnSite 1 Full Day / May 29th)	May 29-30
Finalize the Strategic Plan (Starting July 1, 2024)	OnStrategy	June
Finalize the Communication Documents	OnStrategy	June
Deliverables: Final Strategic Plan Document + Communication Document		June



Board Plan Approval / Adoption of New Plan	Board Meeting	August Board Meeting
Next Steps - Phase 3: Implement the Plan (FY2024/25)		
Part One: Setting up the Execution Cycle	<i>Not included in this Scope; to commence with next school year.</i>	FY24/25
Setup the Plan in OnStrategy application	OnStrategy	August
Setup implementation calendar/approach	OnStrategy w/Planning Team	August
Team trained on performance management (process, system)	OnStrategy	Aug-Sept
Deliverable: Execution Playbook		Aug-Sept
Part Two: Support the Execution Cycle	<i>Not included in this Scope; to commence with next school year.</i>	FY24/25 Sept-Ongoing
Department Reviews	OnStrategy w/Planning Team	Monthly
Quarterly Reviews	OnStrategy w/Planning Team	Quarterly
Board Reporting (Bi-Annual)	OnStrategy w/Planning Team	Mid-Year; EOY
Deliverable: Quarterly Progress Report or Presentation		

Engagement Assumptions

- **OnStrategy Responsibilities:** The OnStrategy Team is responsible for architecting the process, building, and managing the project plan, preparing the onsite and remote session approach and materials, facilitating all sessions, building the final 5-Year Strategic Plan.
- **Customer Responsibilities:** The NSBSD Team is responsible for coordinating session participants, scheduling, offsite venue selection, pulling together existing data, and completing actions as determined from any sessions.
- **Project Timeframe:** The project is scheduled to run from January through June 2024.
- **Session Facilitation:** Includes two trips to Alaska. One in April for a 3-day onsite session in Barrow, Alaska, and the second in May for the Summer Board Retreat (location TBD). OnStrategy will provide two professional facilitators for the sessions.
- **Travel & Expenses:** Travel and expenses (supplies/materials) for two (2) people are estimated and will be billed at actual. The estimate includes airfare, hotel, ground transportation, airport parking, and meals. Cost reduced for any client-paid expenses.
- **Deliverables:** All deliverables listed in the Engagement Approach will be produced by OnStrategy.



Fees

Fees include all services as outlined above. For a frame of reference, the last 5-year planning process conducted in 2019 was priced and executed at \$53,625. Should the nature of the engagement exceed or expand beyond the planning approach as outlined above, a new scope will be drafted for the extension of work.

OnStrategy Services	Cost (USD)	Billing Terms
Developing the 5-Year Strategic Plan	\$70,000	Billed monthly in 5 increments at \$14,000/mo. Due net 30.
Travel Expenses – April 1-3 (1 trip/2 people)	\$5,000 - \$6,500	Billed based on actual. Due net 30.
Travel Expenses – May 29-30 (1 trip/2 people)	\$4,000 - \$5,000	Billed based on actual. Due net 30.
Total (Not-to-Exceed Fees)	\$81,500	

Contract Terms

Invoicing/Payments: Billing terms noted above. All amounts are in US Dollars.

Contract Expiration: Contract expires 90 days from the contract date if not signed.

Project Timeframe: Services to run from January 2024 through June 2024.

Cancellation of Services: If the client wishes to terminate the contract before completion of services, OnStrategy requires a 30-day written notice of such cancellation. Client agrees to pay all fees and expenses associated with services provided until cancellation.

Authorization


Entire Contract: This Contract, including the exhibits hereto, represents the entire agreement between the parties hereto and supersedes all prior and contemporaneous written or oral agreements and all other communications between the parties relating to the Services to be rendered hereunder. Any additions, deletions or modifications shall not be binding on either party unless accepted and approved in writing by duly authorized representatives of both parties. In the event of any contradictory provisions between this Contract and the terms of any agreements, exhibits, attachments or schedules hereto or any purchase order or other documents issued by the Client or OnStrategy in connection herewith, the terms set forth in the body of this Contract shall prevail.



Client:
North Slope Borough School District

Provider:
OnStrategy

Signed: _____



Print: _____

Erica Olsen

Title: _____

CEO/Co-Founder

Date: _____

February 5, 2024

ADDENDUM

PROFESSIONAL SERVICES AGREEMENT

WHEREAS, the Client wishes to obtain professional services from OnStrategy,
WHEREAS, OnStrategy has the knowledge, skill, and capability to perform such services for the Client,
THEREFORE, in consideration of the foregoing, the parties intend to be legally bound, hereby agree to the following:

Services.

OnStrategy is hereby retained by Client, and OnStrategy agrees to provide the services set forth in the Facilitation Services Contract to which this is attached and incorporated herein. Services shall be performed in accordance with the timeline set forth in the Facilitation Services Contract – Engagement Approach, or any supplemental schedule prepared by OnStrategy and agreed to in writing by an authorized representative of the Client.

Service Requirements.

The Services delivered hereunder shall conform in all material respects to the specifications set forth in the Facilitation Services Contract, Expected Outcomes and/or Engagement Approach, and any other requirements agreed upon by the parties in writing. OnStrategy agrees to use sound and professional principles and practices in accordance with normally accepted industry standards in rendering Services hereunder, and OnStrategy further agrees that performance shall reflect the best professional knowledge, skill, and judgment. OnStrategy shall furnish competent personnel for fulfillment of its obligations. If the Client deems OnStrategy personnel unsatisfactory to perform Services due to a failure by such personnel to comply with the terms and conditions imposed on OnStrategy as set forth herein, such personnel shall be removed promptly.

Delivery of Services.

OnStrategy reserves the right to modify the method of service delivery in the event of unforeseen circumstances that prevent travel for in-person delivery or unnecessarily puts the health or safety of the OnStrategy staff or Client participants at risk.

Service Delay.

Client shall promptly notify OnStrategy if there is any unforeseen problem that is likely to cause a material delay or difficulty in OnStrategy's ability to provide the Services and/or achieving any objectives of the Facilitation Services Contract.

Nature of Services.

Work Product. Any and all reports, documentation, files, media and other materials created or produced by OnStrategy in connection with the Services rendered hereunder shall be deemed "Work Product."



Work Made for Hire. The Work Product shall constitute works-made-for-hire belonging exclusively to the Client. To the extent that any Work Product does not constitute a work-made-for-hire owned by the Client, OnStrategy agrees to assign and transfer all of its right, title and interest in such Work Product to the Client. The Client retains the right to modify the Work Product or to merge the Work Product into other documents or other materials owned or utilized by the Client.

OnStrategy Proprietary Material. Client does not under this Agreement acquire any ownership rights in and/or to any software, documentation, tools, techniques, methodologies or other material which has not or is not created as part of the Services to be rendered hereunder which is proprietary to OnStrategy ("Service Provider Proprietary Material"). However, if OnStrategy incorporates any Service Provider Proprietary Material into any Work Product, or any of the Work Product requires Service Provider Proprietary Material in order to operate or otherwise be usable by the Client, OnStrategy hereby grants the Client a nonexclusive, royalty free, fully paid, perpetual, irrevocable license to use the OnStrategy Proprietary Material as part of the Work Product.

Third Party Proprietary Material. The Client does not under this Agreement acquire any ownership rights in and/or to any software, documentation, tools, techniques, methodologies or other material that is proprietary to any third party ("Third Party Proprietary Material"). The Client shall be responsible for obtaining any necessary licenses for Third-Party Proprietary Material. OnStrategy may not incorporate any Third-Party Proprietary Material into the Work Product without the prior written consent of the Client.

Change Orders.

The Client may request changes that affect the scope of the Services relating to the Facilitation Services Contract including change to any deliverables. OnStrategy will accept non-material changes, but all other changes shall occur via a change order signed by the Parties. If any change(s) impacts the cost to OnStrategy for providing the Services or Deliverables or time required to perform its Services, Parties shall negotiate in good faith a reasonable adjustment to applicable fees, time schedule and/or milestones.

Counterparts.

This Agreement may be executed in one or more counterparts, each of which will be deemed to be an original, and such counterparts will together constitute the same instrument.

Severability.

The provisions of this Agreement shall be deemed severable, and if any portion shall be held invalid, illegal or unenforceable for any reason, the remainder of this Agreement shall be effective and binding upon the parties, unless to do so would clearly violate the present legal and valid intention of the parties hereto.

Remedies.

Pursuit by either party of any remedies described herein, or otherwise available at law or inequity, shall not preclude pursuit by that party of any other remedy or remedies provided herein or otherwise available at law or in equity. All remedies, rights, undertakings, obligations and agreements shall be cumulative and none of them shall be in limitation of any other remedy, right, undertaking, obligation or agreement of either party.