



Crosslake Community School
Draft Proposal of Consulting Services for
Comprehensive Strategic Planning

January 30, 2023

IN PARTNERSHIP WITH

TEAMWORKS
EDUCATION LEADERSHIP SOLUTIONS

PREPARED FOR:		PREPARED BY:		
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OVERVIEW

Crosslake Community School (CCS) Director of Online Learning Holly Amaya has requested TeamWorks of Centerville, Minnesota, provide the following Proposal for Services DRAFT to assist the Directors and School Board in comprehensive strategic planning and continuous improvement. The need for this support is driven by a significant increase in enrollment and multiple leadership transitions since the previous strategic plan was created.

CCS offers two learning options to students and families - a seat-based (in-person) program or an online program:

- CCS Seat-Based Program serves approximately 140 students in PreK-8th grade and is led by Annette Klang, Director of Seat-Based Learning.
- CCS Online Program serves approximately 300 students in grades K-12, who reside across the state of Minnesota, and is led by Holly Amaya, Director of Online Learning.

Crosslake Community School Mission Statement

The mission of Crosslake Community School (CCS) is *to grow environmentally literate, community impacting learners of excellence.*

The following proposal outlines the **Classroom to Boardroom Strategic Planning** services that may be provided by TeamWorks. Our initial fee estimates are described on page 7. Following receipt of this DRAFT Proposal for Services, we invite the Directors, 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.

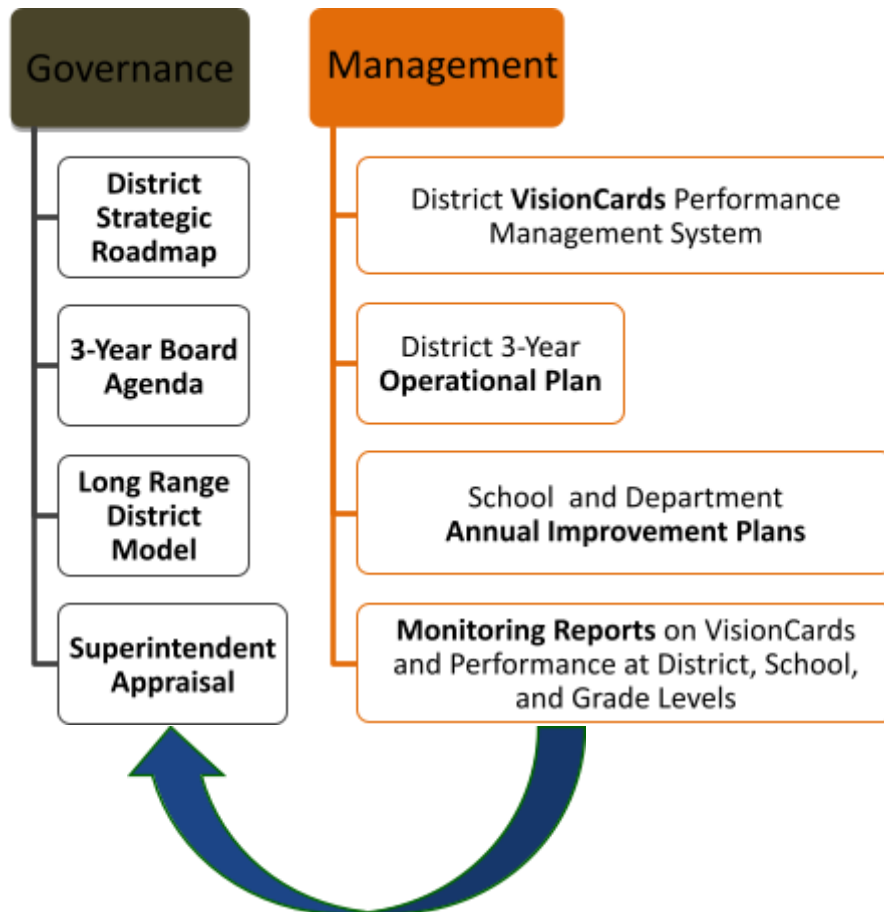
CLASSROOM TO BOARDROOM COMPREHENSIVE STRATEGIC PLANNING PROCESS KEY DELIVERABLES

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*).

CLASSROOM TO BOARDROOM SESSION OUTLINE AND TIMING

Session / Topic	Purpose / Outcome	Who	Timeline
A. Design	Shared design development session	Leadership Team	February
B. Education Leadership System (ELS): Orientation Session 1 <i>*Optional</i>	<p>Three-hour session</p> <ul style="list-style-type: none"> Roles and responsibilities of school boards, Directors, 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>	School Board and District Leaders Building Administrators	February/ March
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. 	Strategic Planning Team + Other community and staff members	February/ March
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. 	Strategic Planning Team + Other community and staff members	February/ March
E. Engagement about Desired Daily Experience (DDE) <i>*(may be completed by district staff)</i>	<p>School and Community-based Stakeholder Engagement Affinity-based facilitated stakeholder sessions ensuring representation of demographics of district:</p> <ul style="list-style-type: none"> <i>Desired experiences of students (up to 2 sessions)</i> <i>Desired experiences of parents/families (up to 2 sessions)</i> <i>Desired experiences of staff (up to 2 sessions)</i> 	Affinity-based stakeholder sessions	March/ April

Session / Topic	Purpose / Outcome	Who	Timeline
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	April
G. Engagement about Desired Daily Experience (DDE) <i>*(may be completed by district staff)</i>	Feedback survey of students (grades TBD), families, and staff ensuring representation of demographics of district.	Survey	April
H. Classroom Theory of Action and DDE <i>(may be combined with VisionCard)</i>	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	May
I. School and Department Data Needs and Analysis <i>*Optional</i>	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	May
J. Classroom to Boardroom Process update <i>*Optional</i>	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	May
K. District VisionCard (may be combined with Theory of Action)	Three-hour session on <ul style="list-style-type: none"> District 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. 	Strategic Planning Team	June

Session / Topic	Purpose / Outcome	Who	Timeline
L. District 3-Year Operational Plan	Three-hour session on <ul style="list-style-type: none"> District 3 Year Operational Plan of the key district 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	June
M. District VisionCard, District 3-Year Operational Plan <i>*Optional</i>	Three-hour session <ul style="list-style-type: none"> Final draft of District VisionCard Final draft of District 3 Year Operational Plan Key messages 	Strategic Planning Team	June
N. Strategic Roadmap Session - Draft	Three-hour session <ul style="list-style-type: none"> Refine the District Mission, Core Values, and Vision, with the Strategic Directions of the Operational Plan organized on one page 	School Board + Leadership Team	July
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	August
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) District 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	August
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	September
R. District 3 Year Operational Plan, School and Department Improvement Plans <i>*Optional</i>	Three-hour session Development of school and department Annual Improvement Plans	Building Leadership Teams + Department Leadership	September

CONSULTING FEE ESTIMATES

Services*	Costs
<p><u>Classroom to Boardroom</u> - Comprehensive Strategic Planning Process</p> <ul style="list-style-type: none"> • Thirteen (13) three-hour sessions plus design session and school board meeting updates • Includes focus groups facilitated by TW consultant [students (2), families (2) and staff (2)] for development of Desired Daily Experience. • Includes preparation and reports. 	<p>\$ 27,400 estimated</p> <p><i>(NOTE: this price will vary depending on final design but estimate includes all sessions and services specified on pages 4-6)</i></p>
<p><u>Modified Classroom to Boardroom</u></p> <ul style="list-style-type: none"> • Ten (10) three-hour sessions plus design session • Focus group facilitation by district staff instead of TW consultants [students (2), families (2) and staff (2)] for development of Desired Daily Experience • Includes preparation and reports. 	<p>\$ 15,600 estimated</p> <p><i>(NOTE: this price will vary depending on final design but this estimate removes all steps defined as "optional" and puts responsibility for focus groups on district administrators).</i></p>
<p>Optional: Principal Consulting Up to 1 day of Principal Consulting time during the year as needed and approved by directors.</p>	<p>\$ 2,800 (billed only for hours used)</p>

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.

A p p e n d i x

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.

OUR MISSION

TeamWorks' mission is to support school districts in improving the experiences and outcomes of students, families and staff – bridging the difference between *What Is and What Ought to Be*.

OUR CORE APPROACH

- 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 school environments and are deeply invested in our clients' success.

OUR TOOLS

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.

OUR CORE SERVICES

Education Leadership System Services

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.

Classroom to Board Room Strategic Planning and Performance Improvement Service

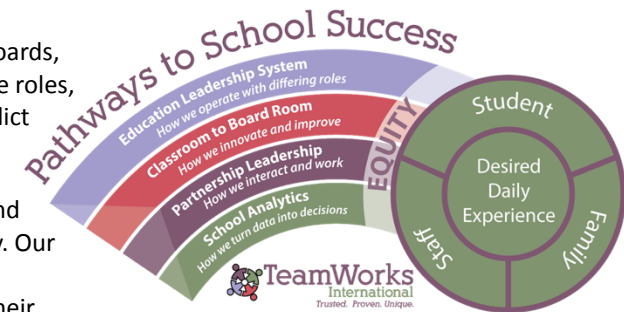
We help clients integrate their mission, vision, strategies, structures, success systems and leadership practice. We then develop a roadmap for the ongoing organizational journey. Our comprehensive, practical and personalized approach encourages those in governance, management and consultative roles to work in concert for the mission and success of their organization.

Partnership Leadership Services

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.

School Analytics

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.



CONSULTANTS

Dennis M. Cheesebrow **CEO and Executive Consultant**

With more than 25 years of experience serving the education, faith, government, business and human service marketplaces, Dennis Cheesebrow brings a broad array of experience in coaching, consulting, leadership and systems development to each client and audience. His direct style is sprinkled with humor, abundance and a deep appreciation for the human dynamics and potential in organizations and communities.



For his entire career spanning coaching, consulting, managing, innovating, and developing, Dennis has been deeply committed to the power of partnership as an essential foundation of professional relationships, structures, and systems in organizations and communities. That passion and commitment have resulted in the development of the core beliefs, philosophy, practices, and intellectual property that TeamWorks International, Inc is built upon.

TeamWorks International is a leading national consultancy in the area of public education and well known for the Education Leadership System™ (ELS): an insightful and pragmatic view into the three authorities of governance, management and consultation. ELS is the model for partnership between six groups of adults to provide for the mission and promise of public education for all students. This structural and systemic approach of aligning the adults for ALL students learning is being applied in urban, suburban, and rural school districts across the country.

TeamWorks International is leading continuous improvement in public education through its School Analytics Services in assisting districts and communities to more deeply understand the intersection of learning, poverty, race, gender and housing to develop collaborative solutions to increase learning while closing the achievement gap, as well as new approaches to developing student learning goals. In addition, School Analytics strengthens and deepens our clients operational and strategic planning through our unique and experienced approach of translating data → insight → strategy → decisions with regards to enrollment, attendance areas, market share, facilities development, demographics, and open enrollment.

Dennis has authored *Partnership; Redefined: Leadership through the Power of &* (2012) as well as the *Educational Leadership System Guidebook* (2009) and the *FrameWorks Guidebook* (2009). He was a contributing author to the book, *Voices From The Field: An Introduction to Human Systems Dynamics* in 2003. He also holds three U.S. Patents from his 17 years at 3M as an engineer, research laboratory manager and marketing/business manager prior to founding TeamWorks International in 1995.

Dr. Ray Queener
COO and Principal Consultant

Ray Queener, senior 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 the last 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.

Julie Baeb

Senior Consultant

Julie Baeb, Senior Consultant at TeamWorks International, is a skilled design-thinker, facilitator and educator who brings expertise in human-centered design and crowd-sourced innovation. Her experience includes coaching and leading student and teacher innovation teams, architectural design and advertising.



Julie is passionate about how the physical environment shapes student learning and uses her background in architecture and design thinking to engage students and staff in creating spaces that support desired learning and teaching experiences. She is skilled at workshop facilitation, qualitative design research, community engagement, strategic planning, and giving clients the tools and creative confidence to find innovative solutions grounded in empathy and equity.

Julie spent nine years at Minnetonka Public Schools where she played a pivotal role in the district's crowd-sourced innovation program. She coached student innovation teams and staff Idea Champions to gain empathy for end-users, clearly define the problem, prototype, test and scale ideas to develop proof of concept. She also created a STEM-based enrichment program to meet the needs of visual-spatial learners and coached teachers on ways to enhance curriculum with maker-space tools and human-centered design.

For her innovative work in Minnetonka Schools, Julie received the Minnetonka Public Schools Award of Excellence and Innovation Partner of the Year as well as Design and Innovation Global's Cultural Transformation award. She has also presented applications for human centered-design in education at architectural and educational conferences.

Prior to her work in Minnetonka Schools, Julie worked at architectural firms Skidmore, Owings & Merrill and Scrafano Architects, and advertising agency Leo Burnett. Julie holds a Masters Degree in Architecture from Rhode Island School of Design, received her Human Centered Design training from Stanford d.School and is a certified facilitator through Voltage Control. She received her bachelor's degree in Journalism and Mass Communication from Drake University.

Comparable References

<p>Intermediate School District 917 1300 145th Street East Rosemount, MN 55068</p> <p>Contact: Dr. Michael Favor 651.423.8229 michael.favor@isd917.org</p>	<p>Eastern Carver County Schools 11 Peavey Road Chaska, MN 55318</p> <p>Contact: Lisa Sayles-Adams 952.556.6111 saylesadamsl@district112.org</p>
<p>St. Michael – Albertville Schools 11343 50th St. NE Albertville, MN. 55301</p> <p>Contact: Dr. Ann Marie Foucault 763.497.3180 annmarief@mystma.org</p>	<p>New Prague Area Schools 410 Central Ave. N. New Prague, MN 56701</p> <p>Contact: Tim Dittberner 952.758.1700 tdittber@isd721.org</p>

“One of the best things about TeamWorks is their diverse repertoire of knowledge and skills. It is a huge timesaver when I call and ask for help with a particular topic and they know exactly what resource I need and how to deliver the professional learning. I also enjoy the partnership. They truly partner with districts---they do not operate in a silo but rather a part of our team and this accelerates professional learning.”



Dr. Ann-Marie Foucault

Superintendent, St. Michael-Albertville Schools