



To: Harlem Board of Education
Josh Aurand, Chief School Business Official
From: Jason Blume, Director of Equity and Community Engagement
RE: Long-Range Plan Contract
Date: December 8, 2021

OVERVIEW

Harlem School District (HSD) developed a long-range plan in 2016, which now is largely completed or outdated. While many of the goals and initiatives outlined in previous plans are ongoing, a comprehensive process involving all the district's stakeholder groups will be beneficial to identify new approaches and potentially new initiatives on which the district would like to focus. The resulting document will be a comprehensive strategic plan to present to the Board of Education for approval. To keep the process thorough, open, and inclusive, we are interested in leveraging the expertise of a third party experienced in facilitation. A basic outline of events and timeline has been developed and we would like support identifying and implementing a process.

OBJECTIVES

We have identified the following objectives in working with Chartwell Agency to design, implement, and analyze a comprehensive and inclusive long-range planning process:

- Design the process to ensure active participation in and useful input from its stakeholder groups including faculty/staff, students, families, partners, and the community at large.
- Prepare internal team members with the skills and information to facilitate visioning sessions for administrators, certified staff, support staff and students.
- Help develop additional tools to solicit participation and input from stakeholder groups including potential focus groups and surveys.
- Coordinate the agenda and facilitate the activities for the Long-Range Plan Task Force, making the most of a 1 ½ - 2-day retreat to define specific goals for which the administrative team can develop tactics and timelines.



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APPROACH

Chartwell Agency has experience with all facets of the strategic planning process, and our ability to provide structure, manage the process, and encourage the participation of all attendees is key to the success and outcomes of the organizations and processes we facilitate. To meet the outlined objectives for our long-range plan, Chartwell Agency recommends the following as an initial scope of work.

Visioning Process Format

Chartwell Agency will work with HSD administration to design a visioning process that provides the structure to solicit meaningful insight from participants. Sessions should be fast-paced, fun, and interactive. Deliverables include:

- ✓ Vision session agenda and outline with expected outcomes
- ✓ List of materials needed for each session

Survey Development

There is both an art and science to collecting input from a group of people designated to represent a larger population. Surveys can allow the district to collect both quantitative and qualitative data to serve as a roadmap for strategic direction and benchmark for growth. Chartwell Agency can work with administration to design a community survey to be distributed across channels to collect meaningful insight from stakeholder groups. The finished survey can be designed with questions and response mechanisms to measure:

- ✓ Awareness of current initiatives
- ✓ Perceived areas of strength or weakness
- ✓ Ranking of district priorities

The total do-not-exceed budget for the vision process design is \$2,000 - \$2,250. The total do-not-exceed budget for the survey development is \$2,250 - \$2, 2450. The cost does not include printing.



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