



# PROPOSAL FOR STRATEGIC PLANNING CONSULTING SERVICES



Connecting Educators, Improving Education  
[www.HYAstrategicPlanning.org](http://www.HYAstrategicPlanning.org)

## Prepared For:

Geneva CUSD 304  
227 N Fourth Street  
Geneva, IL 60134

October 20, 2023



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October 20, 2023

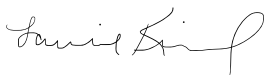
Thank you for the opportunity to present this overview of the services that Hazard, Young, Attea & Associates (HYA) can provide to Geneva CUSD 304 for your work to develop an actionable Strategic Plan that results in improved student outcomes. The research-based HYA approach creates a shared vision of success among stakeholders, which serves as the basis for long-term priorities and objectives. Furthermore, we understand that real change occurs as a result of system alignment and operational plans developed during the implementation phase. HYA provides the tools and support so that Strategic Plans result in measurable systemic change.

Since 1987, HYA has provided services for education leaders to employ school executives, address issues related to student performance, and support aspects of school district operations, including Strategic Planning. We serve school systems nationwide, large and small, urban and rural, with Associates located across the country to conveniently serve clients with a local focus but with national reach. We have facilitated hundreds of strategic plans that have produced lasting school improvements throughout our 35+ year history.

The process outlined in this proposal provides options so that activities can be customized for the District's unique needs while remaining true to our research-based and proven methods.

We look forward to the potential of supporting the School Board, District Leadership, and the Geneva community as you develop a Strategic Plan that continues your focus on improving student outcomes.

Sincerely,



Laurie Kimbrel, Ed.D.  
lauriekimbrel@HYASearch.com



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For 35 years, Hazard, Young, Attea, and Associates have partnered with school districts to chart a course for the future. The foundation of HYA is the expertise and quality of the firm's national network of associates. Presently, HYA is represented by over 100 associates across the United States who assist with the firm's mission to help school leaders focus on improving student outcomes through proactive, thorough, and quality assistance in strategic planning, leadership, and analytics. HYA Associates bring extensive experience and broad educational backgrounds to our practice. Through continuing involvement in school and university work, HYA Associates know the most current educational issues and policies that affect our schools. For every project, HYA carefully selects a team of associates who are a close fit for the District.

Additionally, HYA has professionally staffed offices, technological infrastructure, and full-time employed staff. As a result, HYA can deliver solutions for each Phase of strategic planning, including the analytics that are an essential component for monitoring the degree to which the school district is executing action plans and measuring progress toward the strategic priorities. Each Strategic Planning project is assigned a team of Associates, a project manager, and all work is overseen by the Lead Associate for Strategic Planning and HYA President.



## **NATIONAL REACH. LOCAL FOCUS.**

Our associates bring together local knowledge with nationally accepted best practices to support your district.

# Description of Experience

Over the past three years, HYA has successfully completed a total of 265 projects with school districts and educational organizations. The list below includes strategic plans currently being implemented or developed.

SCHOOL DISTRICT	LOCATION	STRATEGIC PLAN DATES	STUDENTS
Galesburg District 205	Galesburg, IL	In progress	4,000
Hillsborough Township Public Schools	Hillsborough, NJ	In progress	7,243
White Plains School District	White Plains, NY	In progress	7,025
Calvert County Public Schools	Prince Frederick, MD	In progress	15,292
McHenry High School District 156	McHenry, IL	In progress	2,180
Ohio Valley Educational Cooperative	Shelbyville, KY	In progress	15 member districts
Irvington Free Union School District	Irvington, NY	2023-2028	1,800
Woodstock Community Unit District 200	Woodstock, IL	2023-2028	6,000
Kirby School District 140	Orland Park, IL	2023-2028	3,500
Minooka Community Consolidated District 201	Minooka, IL	2023-2028	4,500
The Sherman School	Sherman, CT	In progress	250
School Association for Special Ed of DuPage	Lisle, IL	2023-2028	17 member districts
New Jersey State Interscholastic Athletic Assoc.	Robbinsville, NJ	2023-2027	435 high schools
Ashland Public Schools	Ashland, MA	In progress	2,800
Barrington Community Unit School District 220	Barrington, IL	2022-2032	8,200
Palos CCSD 118	Palos Park, IL	2022-2027	1,994
Derby Public Schools	Derby, KS	2022-2027	6,800
True North Special Education Cooperative	Highland Park, IL	2022-2027	37,217
Elmhurst Community Unit School District 205	Elmhurst, IL	2023-2028	8,000
Tri-creek School Corporation	Lowell, IN	2022-2027	3,000
St Charles Community Unit District 303	St. Charles, IL	2022-2027	12,248
Community Consolidated District 93	Bloomington, IL	2022-2027	3,618
Bensenville School District 2	Bensenville, IL	2022-2027	2,205
Avoca School District 37	Wilmette, IL	2022-2027	726
Regional School District 17	Haddam-Killingworth, CT	2022-2027	2,015
Bloomington School District 13	Bloomington, IL	2021-2026	1,403
Kirkwood School District	Kirkwood, MO	2021-2026	5,760
Rock Island School District	Rock Island, IL	2019-2025	6,300
Watchung Hills Regional HSD	Warren, NJ	2020-2025	2,027
Hiawatha CUSD 426	Kirkland, IL	2019-2024	515
Harvey School District 152	Harvey, IL	2020-2025	2,266
Elementary School District 159	Matteson, IL	2019-2023	1,822
School District U-46 Foundation	Elgin, IL	2019-2023	40,400
Asian Human Services/Passages Charter	Chicago, IL	2019-2023	400
Goddard School District	Goddard, IL	2020-2025	5,658
Somonauk CUSD 432	Somonauk, IL	2018-2023	808
Madison Elementary School District #38	Phoenix, AZ	2020-2025	5,672
Laurens County School District 55	Laurens, SC	2018-2023	6,030
Prospect Heights School District 23	Prospect Heights, IL	2018-2023	1,533
Grayslake Community High School District 127	Grayslake, IL	2018-2023	2,970
Hazelwood School District	Florissant, MO	2017-2022	17,418
Downers Grove Grade School District 58	Downers Grove, IL	2018-2023	5,000
Washington Township Public School District	Sewell, NJ	2020-2025	7,202
Niles Elementary School District 71	Niles, IL	2017-2023	550
Montgomery Township School District	Skillman, NJ	2017-2023	4,713
Higley Unified School District	Gilbert, AZ	2017-2023	10,508
Community Consolidated School District 146	Tinley Park, IL	2019-2024	2,400
Fairfax County Public Schools	Fairfax, VA	2019-2024	188,000

# Strategic Planning References & Examples

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## **Barrington 220 Community Unit School District**

515 W Main Street, Barrington, IL 60010

Contact: Dr. Craig Winkleman, Superintendent of Schools

[cwinkleman@barrington220.org](mailto:cwinkleman@barrington220.org)

847-842-3537

[Link to Strategic Plan](#)



## **Elmhurst CUSD 205**

162 S. York Street, Elmhurst, IL 60126

Contact: Dr. Keisha Campbell, Superintendent

[kcampbell@elmhurst205.org](mailto:kcampbell@elmhurst205.org)

630-834-4530

[Link to Strategic Plan](#)

[Link to Strategic Dashboard](#)



## **Community Consolidated School District 93**

230 Covington Drive, Bloomingdale, IL 60108

3,600 students

Contact: Dr. David Hill, Superintendent of Schools

[hilld@ccsd93.com](mailto:hilld@ccsd93.com)

630-539-3000



## **Minooka CCSD 201**

305 W Church Street, Minooka, IL 60447

Contact: Dr. Kris Monn, Superintendent of Schools

[kmonn@min201.org](mailto:kmonn@min201.org)

815-467-6121 Ext. #1

[Link to Strategic Plan](#)

# Project Overview

## The HYA Four Phase Process

A SYSTEMIC APPROACH FOR MAXIMUM IMPACT

### PHASE I

#### Organizational Readiness

Setting the stage for Strategic Planning through planning, preparation, and shared learning



### PHASE II

#### Inclusive Engagement

Documenting the current state of the District and desired future through authentic stakeholder engagement



### PHASE III

#### Focus on the Future

Collaborating to use data to create the Strategic Plan



### PHASE IV

#### Implement & Evaluate

Creating action plans and measures to operationalize the Strategic Plan



Our process reflects the most current education and management research focused on backward design so that priorities and objectives will lead to the realization of the shared vision for success.

HYA Associates partner with district leaders and school boards to implement a strategic planning model customized to meet district needs and local conditions, yet grounded in the HYA four-phase model. Examination of progress towards the current strategic plan will also be an integral part of our work so that alignment and continuity are evident to stakeholders.

The HYA strategic planning model provides a framework for decision-making that builds upon the shared vision and values held by the community. The concrete phases empower leaders with critical information and strategies to bring decisions into focus.

#### The final Strategic Plan includes:

**Vision** – shared beliefs about the optimal future state of the district

**Mission** – the purpose of the district and what sets it apart from others

**Core Values** – agreements about the essential work of the district

**Priorities/Goals** - 3-5 areas of concern that arise from the data

**Objectives** - critical areas of focus for each Priority/Goal

**Implementation Plans** - strategies, timelines, persons responsible, budgets, & strategic indicators

# Project Scope

## Phase I: Organizational Readiness



HYA will begin to engage and collaborate with District leaders and the School Board to set the stage for a successful Strategic Planning Process. Preparation, readiness, and shared learning before taking action are essential planning components that set HYA apart.

Activity	Description	Participants
Workshop Session	HYA Associates will conduct a half-day workshop to discuss the continuous improvement cycle including the importance of the shared vision, and to finalize project plans & timelines.	HYA Associates District leaders Others as invited
Board of Education Input & Update	HYA Associates will provide an overview of the process, timeline, and decisions made at the workshop session. Board members will have the opportunity to ask questions and provide input.	Full School Board at an open meeting District leaders HYA Associates
Communication Toolkit	HYA Provides a written Communication Toolkit that includes communication ideas and templates. Examples of press releases, social media posts, website updates, and focus group invitations are included. HYA Associates will coach the District Leadership through the use of these tools.	HYA Associates Superintendent or designee

### Phase I Deliverables

- Finalized project timeline
- Community Engagement plans for interviews, focus groups, and survey



# Phase II: Inclusive Engagement



This Phase of the process involves documenting the current state of reality and desired future position of the school district through authentic stakeholder engagement. The Strategic Plan is successful when it reflects the stakeholders' feedback, opinions, and ideas. All data will be aggregated, synthesized, and analyzed. Trends and patterns will be identified, and areas of priority for future work in the district will emerge.

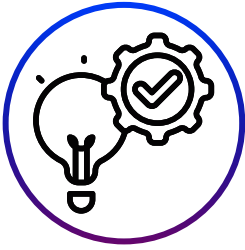
Activity	Description	Participants
Individual Interviews	In-depth, one-hour interviews with key stakeholders to discuss the current state of the district and vision of the future.	School Board members Superintendent Superintendent's cabinet
Focus Groups	Focus groups of 15-20 stakeholders held throughout the District in order to gather detailed and nuanced views of current functioning and the vision for the future. Emphasis will be placed on creating focus groups that reflect the diversity of the community in terms of thought, experience, race/ethnicity, and role.	Focus groups will include students, parents, community members, community leaders, teachers, staff, leaders, existing advisory groups, and elected officials.
Community Survey	A valid and reliable Community Survey is delivered to constituents electronically on a platform fully hosted by HYA. The survey includes four sections: the current state of the district, quality of programming, strategic plan priorities, and equity.	All stakeholders are invited to participate in the electronic survey. The survey will be disaggregated by six stakeholder groups of the district's choosing.
Environmental Scan	HYA Associates will review pertinent data including but not limited to performance on the current strategic plan and student achievement reports.	HYA Associates District leaders

Activity	Description	Participants
Data Analysis & Synthesis	HYA research associates will analyze all data gathered during Phase II and prepare reports suitable for publication.	HYA Associates
Data Reports Delivered	HYA Associates will present the data reports to the leadership team before use by the strategic planning committee.	HYA Associates Superintendent Cabinet
Finalization of Strategic Plan Committees	The Strategic Planning Committee is formed and meeting dates are set. If the District chooses the Portrait of a Graduate option, a separate committee may be formed for its development.	Committees comprise various stakeholders, including Board Members, District leaders, faculty, and staff, parents, students, and community members.

## Phase II Deliverables

- Community Engagement Report of Qualitative data gathered during focus groups, interviews, and environmental scan. The data report provides an executive summary of trends and patterns as well as detailed data from stakeholder groups. The Associates who create this report are trained and experienced qualitative researchers who use a process of coding to determine trends and patterns.
- Community Survey Report of quantitative data in an easy-to-read and understandable format, disaggregated by six stakeholder groups of the district's choice.

# Phase III: Focus on the Future



During Phase III, the information collected from the Inclusive Engagement Phase is used to create the Portrait of the Graduate (if selected) and the Strategic Plan. HYA Associates use proven protocols and facilitation techniques to ensure that all voices are heard and that the plan aligns with the data, research, and best practice.

Activity	Description	Participants
Review of data reports & development of root cause analysis	Data reports from Phase II are reviewed with the Strategic Planning Committee. Issues are studied and Associates facilitate the collaborative development of a Needs Assessment & Root Cause Analysis.	Strategic Planning Committee
Strategic Plan Committee development of draft Plan components	The Strategic Plan Committee is assembled to develop draft components of the Strategic Plan using the data reports, Root Cause Analysis, and the Climate & Culture Survey. All priorities and objectives are aligned with the Portrait of the Graduate. Strategic plan components include: Mission, Vision, Core Values, Priorities & Objectives.	Strategic Plan Committee
School Board update & input	Preliminary Report Delivered to School Board. The draft plan components are shared with the School Board at an open meeting for input and comments.	School Board
Refinement & finalization of Strategic Plan	Input from the Board is used to refine the Strategic Plan draft.	Strategic Plan Committee
School Board approval and rollout of the plan	The final Strategic Plan is presented to the School Board for approval at an open meeting.	School Board Superintendent

## Phase III Deliverables

- The final strategic plan, including:
  - Shared Vision – an agreed upon statement of the ideal future of the District
  - Mission – the purpose of the District and what sets it apart from other
  - Core Values – agreements about the essential work of the District
  - Priorities (3-5)
  - Objectives (between 5-7 per Priority)

## Phase IV: Implement & Evaluate



The final Phase of Strategic Planning is ongoing and focuses on support and coaching to measure the plan's impact and implement the continuous improvement cycle.

Activity	Description	Participants
Creation of District level Implementation Plans	The Strategic Plan is operationalized through implementation plans that include activities/strategies, timelines, persons responsible, and budgets. HYA Associates will conduct three full day workshops to facilitate implementation plan development.	Strategic Design Teams made up of educators with expertise in each Strategic Priority.
Creation of Strategic Indicators, including measures & benchmarks	Strategic Indicators measure system change as a result of the plan. All Indicators include measures and benchmarks. Strategic Indicators will be developed during Implementation Plan Workshops	Strategic Design Teams made up of educators with expertise in each Strategic Priority.
Delivery of Strategic Dashboard	The HYA Strategic Dashboard allows Districts to tell their stories and share the definition of success and progress. The Dashboard helps to hold the system accountable for progress and is a product exclusively for Districts that work with HYA.	District Communication Department Superintendent or designee

## Phase IV Deliverables

- Implementation plans for each Strategic Priority including activities, timelines, persons responsible, and Strategic Indicators
- Strategic Dashboard

## Timeline

Typically, Phases I-III of the Strategic Planning process take between 4-6 months. Phase IV typically takes about 2 months. HYA has the resources and personnel to meet the milestones that will be set forth during a collaborative discussion with district leadership during Phase I of the process. Associates will backwards map all strategic planning activities in collaboration with District staff to ensure all activities occur during the most ideal timeframes. School breaks and other significant events will be considered as the timelines are finalized.

# Project Personnel

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## Dr. Brian Harris - Project Lead

Brian Harris, Ed.D., began his educational career as a high school teacher over 35 years ago and has served students, families, and communities in a variety of educational roles. After teaching for 4 years, he was an Assistant Principal for seven years and Principal at Haines Middle School in St. Charles, IL that earned the US Department

Blue Ribbon in 2006. He served as an Assistant Superintendent for Learning and Teaching and then as the Assistant Superintendent for Human Resources in St. Charles District 303 for five years, before obtaining his first Superintendency at the 16,000-student district of Wheaton Warrenville D200 in 2010. After serving this large PreK-12 district with 20 schools for four years, he was hired as the Superintendent of Schools in Barrington CUSD 220 in 2014 and retired in June 2021. Barrington 220 is a high performing school district that has had ten US Department of Education Blue Ribbon schools and annually is recognized as one of the highest performing school districts in the country based on AP College Board and US News and World Report magazine.

Dr. Harris served as the President of LUDA (Large Unit District Association) in Illinois and also on the AASA Governing Board and AASA Executive committee advocating for public education at the state and national level. He also was recently named as the Lake County (IL) Superintendent of the Year in the 2020-21 school year. Dr. Harris has served and presented at state and national conferences on a variety of topics:

- AASA National Conference Presentations: Business Incubator EDU, SEL data / Forecast5, Master Facility planning

- U.S. Department of Education: Presentations on Future Ready Schools

- National ConnectED Superintendent Summit in Washington, DC, November 2014 Presented: ConnectED to the Future: Transition to Digital Learning

- American Association of Community Colleges Convention (AACC) presented Northwest Educational Council for Student Success (NECSS) Topic: High School and College Alignment: A High Impact Sustainable Partnership That Improves College Success

- Suburban School Superintendents Conference presented: Into the Shark Tank: Community Collaboration, Entrepreneurship, and Enterprise

- Achieve the Dream Conference – Northwest Educational Council for Student Success (NECSS) Topic: Collective Impact Ecosystem for Regional Student Success / Dual Credit

University of Illinois – Urbana/Champaign, BS Secondary Education

Northern Illinois University, MS Education Administration

Northern Illinois University, Ed.D. Education Administration



## **Rebecca Berger, MSW, LCSW - Focus Group Facilitator**

Becky Berger is a licensed Clinical Social Worker with a private practice in Northbrook, Illinois. Becky has over 25 years of clinical experience including working as a school social worker at Highland Park High School and Lake Forest High Schools and as an Intervention Specialist at the Northern Suburban Special Education District.

Becky specializes in the treatment of adolescents, adults, and couples. She also has a focus on treating anxiety disorders and sports therapy. She has worked with student athletes, as well as professional athletes, across the Chicagoland area. Throughout her career, Becky Berger, has focused on helping clients evaluate needs, set objectives, anticipate obstacles and reach their goals . This includes both individual clients, as well as educational systems and organizations. Becky has spoken extensively to parent groups and school districts on topics including Raising Teens in the North Shore, Parenting Adolescents in an Online World, Anxiety Treatment Techniques, and Mindfulness for Stress Reduction. She has been an active member of several professional organizations including National Association of Social Workers, Illinois Association of School Social Workers, Therapy Dogs International, and the K-9 Reading Buddies of the North Shore.

As an Associate for HYA, Becky Berger has facilitated many focus groups in and around Chicago helping districts with Executive Searches and Strategic Planning. Her extensive experience conducting group therapy sessions and as an avid speaker makes her an ideal associate to conduct focus groups. Through research, creative problem solving and collaboration she is able to assess and evaluate district and community needs.

- Indiana University, BA Psychology
- Loyola University Chicago, MSW Social Work

# Project Pricing

Phase	Services	Price
Phase I Organizational Readiness	<b>Workshop Session/On-site/ Half-day Board Study Session/On-site/</b> Approximately one hour at a regular or workshop meeting of the Board. <b>Communication Toolkit provided</b>	\$2,000
Phase II Inclusive Engagement Quantitative Data	<b>Community Survey/</b> The HYA Strategic Planning Community Engagement Survey is an online, research based instrument that has a specific analysis, scoring logic and reporting framework. A link to the survey will be provided to the District for distribution. Full Analysis and reporting is included.	\$2,500 Spanish and English language included in the base price. Additional languages may be added for \$415 per language.
Phase II Inclusive Engagement Environmental Scan	<b>Data Review/</b> HYA Associates will review current District performance data from existing data reports provided by the District. The data review will be included in the Phase II Data Reports.	\$1,500
Phase II Inclusive Engagement Qualitative data	<b>Interviews/</b> Virtual/ 10 interviews with Board, Superintendent, & Cabinet, facilitated one HYA Associate <b>Focus Groups/</b> On-site/ 15 focus groups for 12-15 stakeholders, approximately one hour each, facilitated by one HYA Associate <b>Data Analysis &amp; Report Creation</b> Analysis of all qualitative data by qualified researcher	\$12,500



Phase	Services	Price
<b>Focus on the Future – Data Review &amp; Needs Assessment Development</b>	<b>Data Review &amp; Needs Assessment</b> /on-site/one day meeting with the Strategic Plan Planning Committee	\$2,500
<b>Focus on the Future – Strategic Plan Development</b>	<b>Work sessions to develop Plan Components</b> /on-site/ two days <b>Board of Education update &amp; input</b> /on-site/conducted as an agenda item on a regular board agenda <b>Provision of final Strategic Plan</b>	\$5,000
<b>Implementation</b>	<b>Work sessions to develop implementation plans</b> /on-site/ two days/one associate	\$5,000
<b>Implementation</b>	<b>Strategic Dashboard delivery</b>	First year - no charge for IASA members, If renewed for subsequent years - \$10,000 annual subscription
<b>Project Management</b>	<b>Bi-weekly meetings with Superintendent or Designee during Phases II &amp; III</b> /virtual/ 30 minutes each  <b>Quarterly follow up</b> /virtual/first year of plan implementation/Lead Associate	Included in prices for each phase
<b>Project Total</b>	All work and deliverables as specified in the proposal.	\$31,000