

Outline of Strategic Planning Activities

Meeting	Purpose
Readiness 1: Developing clarity and understanding of the strategic planning process, roles, and responsibilities.	Overview of the process for Core Leaders: Leaders learn about strategic management, the history of the strategic planning process, components of the process, selection of team members, and conducting an environmental scan. Leaders learn about communicating the process to others, so they know what it ahead. (HALF DAY)
Readiness 2: Supporting district leaders prepare data and information to assist the plan team understand current district performance compared to past and to other districts.	Preparing the data for the strategic plan team: Leaders learn about the preparation of environmental scan data and key performance indicators and measures. They prepare qualitative and quantitative data and information to share with the plan team about the district's performance. They learn about preparing for the student achievement report. preparing for the culture and climate report (Learning environment and Working environment), and preparing for the resources report (Finance, facilities, and technology). (HALF DAY)
Other Readiness: Other readiness activities	Other readiness activities may be agreed to by both parties as identified in Readiness 1 and Readiness 2 activities
Orientation: Understanding the plan team's roles and responsibilities and the steps in the planning process. This two-hour session is virtual.	First Meeting (virtual) of the plan team: Team meets each other and answers the question, "Who is in the room and what are we charged to do?" Team learns about the strategic planning process, roles, responsibilities, and timelines. Team previews the three big meetings. Team learns about the current strategic plan. Team understands the importance of data in the process. Team understands the responsibilities for representing and sharing with other stakeholders. (HALF DAY)
Data Retreat: Identifying the strengths, weaknesses, opportunities, and threats of current district performance. This six-hour session is face-to-face.	Second Meeting (face-to-face) of the plan team: Team learns the process used to answer the important question of, "Where are we now?" By the end of the session the team identifies the strengths, weaknesses, opportunities, and threats (SWOT) of the district. This session creates a shared understanding among all team members of the current performance of the district compared to the past and to others. Trend, demographic, comparative, and cohort data are shared. (FULL DAY - BIG Meeting #1)
SWOT Analysis and Feedback: Documenting collective district strengths, weaknesses, opportunities, and threats. Seeking feedback from stakeholders not on the team about the team's thinking.	Facilitator will take the team's work and draft a consensus SWOT analysis and provide consensus content to the district to conduct stakeholder feedback. The district will provide opportunities for stakeholders to react to the team's findings. They will have an opportunity to identify additional strengths, weaknesses, opportunities, and threats not identified by the team. The team will review this feedback and revise/refine the SWOT Analysis at the next session.

<p>Vision Retreat: Envisioning a 2030 mission, vision, portraits, and core values to capture a preferred future for the district. This six-hour session is face-to-face.</p>	<p>Third Meeting (face-to-face) of the plan team: Team learns the process used to answer the important question of, “Where do we want to be?” By the end of the session the team updates the mission, vision, portraits (Graduate, Educator, and System), and core values of the district. This session creates a shared understanding among all team members of the preferred future of the district compared to the present. (FULL DAY - BIG Meeting #2)</p>
<p>Preferred Future Statement and Feedback: Documenting collective mission, vision, portraits, and core values Seeking feedback from stakeholders not on the team about the team’s thinking.</p>	<p>Facilitator will take the team’s work and draft a consensus Preferred Future Statement and provide content to the district to conduct student and staff feedback. The district will provide opportunities for stakeholders to react to the team’s findings. They will have an opportunity to identify additional concepts for mission, vision, portraits and core values The team will review this feedback and revise/refine the Preferred Future Statement at the next session.</p>
<p>Setting Direction Retreat: Updating district long-range goals, indicators, and measures and identifying the critical work the district must achieve over the life of the plan to achieve those goals and accomplish the mission and vision. This six-hour session is face-to-face.</p>	<p>Fourth Meeting (face-to-face) of the plan team: Team learns the process used to answer the important question of, “How will we get from where we are to where we want to be?” By the end of the session the team updates the current long-range goals/priorities of the district. It identifies critical strategies for each goal that need immediate attention to improve the performance of the district. It also identifies and makes suggestions for key performance indicators, measures and targets to monitor, track and report long-range goal and strategy progress. This session creates a shared understanding among all team members of the future focus and direction of the district. (FULL DAY - BIG Meeting #3)</p>
<p>Draft of Strategic Plan and Feedback Documenting the consensus draft of the strategic plan. Seeking feedback from stakeholders not on the team about the team’s thinking.</p>	<p>Facilitator will take the team’s work and produce a consensus draft of the strategic plan and provide content to the district to conduct stakeholder feedback. The district will provide opportunities for stakeholders to react to the team’s draft of the strategic plan. They will have an opportunity to identify additional concepts for mission, vision, portraits, core values, long range goals, and critical strategies. The team will review this feedback and revise/refine the draft of the strategic plan at the final session.</p>
<p>Final Meeting: Reflecting on all feedback, the team will have a final opportunity to document its recommendation. This two-hour session is virtual.</p>	<p>Fifth (Virtual) and Final Meeting of the Plan Team: Strategic Plan Team’s fifth and final meeting to share stakeholder feedback on the draft of the strategic plan to make final adjustments leading to the recommendation to the superintendent. The final meeting will answer the question, “What will we recommend to the Board of Education?” <i>The team will also understand the process and timeline leading to Board of Education approval.</i> (HALF DAY)</p>

Recommendation: The facilitator will prepare the final consensus recommendation.	Facilitator will take team’s work and produce all deliverables to the district.
Living the Plan: After board approval, training will begin in the areas of first year action plans for identified goals and strategies and in the development of a scorecard/dashboard system to track progress, set annual targets, and communicate impact to district stakeholders.	<p>Following the approval of the strategic plan, the core team along with Champions of each goal team will participate in two training sessions:</p> <p>Action Plan Training: Team leaders learn the action planning process to answer the question, “What will we do differently for the year to improve our performance?” Goal action team leaders (Champions) and others will learn of the consistent action planning process for all goals and strategies. The Plan-Do-Study-Act process is used as the framework for developing annual action plans. The training includes clarity in the process, selecting goal action team members, roles and responsibilities of goal team members, and the use of a consistent action plan template for shared understanding and simplicity. The roles and responsibilities of goal champions are clarified.</p> <p>Scorecard/Dashboard Training: Goal action team leaders (Champions) and others will learn of the difference between a scorecard and a dashboard for tracking. These leaders will ensure data and other information is collected, monitored, and reported to answer the question, “How will we know we are making an impact and what will we do if we are not?” monitoring and reporting goal and strategy growth and improvement. They will learn about leading and lagging indicators for tracking impact. They will develop a draft of all KPIs. They will learn about the 3-cycle check-in process and the importance of communicating impact with all stakeholders.</p> <p>(HALF DAY)</p>

Proposal: Strategic Planning and Management

Perry D. Soldwedel will serve as the facilitator for all strategic plan work. Perry has been certified as a strategic plan coach and facilitator by the Strategy Management Group/Scorecard Institute. This group helps organizations focus on strategy and improve performance. It serves healthcare, business, government, and education. In education it serves both K-12 and Higher Education. SMG provides consulting, training and professional certification to professional organizations worldwide related to:

- Strategic Planning
- Balanced Scorecard
- Key Performance Indicators
- Performance Measurement
- Strategic Management

About Perry Soldwedel



Former teacher, principal, curriculum director, assistant superintendent, and Illinois public school superintendent. 1970-2003

Director specializing in systems thinking, strategic planning, data management contracting with the Catalyst for Educational Change. 2003-2023 (A consortium of school districts in Illinois)

CEO Soldwedel Consulting LLC. Coaching, training, and networking educational leaders to live a strategic plan through the Strategy Management Group's 8 Dimensions: Leadership, Culture and Values, Strategic Thinking and Planning, Alignment, Performance Measurement, Performance Management, Process Improvement, and Sustainability. 2005-present

Certified strategic plan and management facilitator-Strategy Management Group/Scorecard Institute 2011-present

Author- Solution Tree 2009-present: ***The Schoolboard Fieldbook: Leading with Vision and Aligning School Districts as PLCs***

National Education Advisory Board- ASQ: American Society for Quality

Three degrees from Bradley University, Western Illinois University, and the University of Illinois.

Adjunct professor University of Illinois

For complete information about Perry Soldwedel and Soldwedel Consulting LLC please visit the Soldwedel Consulting LLC website:

www.soldwedelconsultingllc.org

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The **mission** of Soldwedel Consulting, LLC is to assist school districts manage resources efficiently and base strategic plans on validated strategies to achieve organizational goals and improve organizational performance.

The **vision** includes making a difference and positively impacting growth and achievement: Excellence. Expectations. Performance. Every student. Every classroom. Every School. Every District.

Core Values include:

- All in- *in everything we do*
- Customer success- *when learners succeed, we succeed*
- Do the right thing – *learner focused, continuous improvement*
- Innovate - *take bold and smart risks*
- Put people first - *treat each other with dignity and respect*