

## : Strategic Plan Development Process

### Getting Started:

1. District Intake Questionnaire (*Please prepare answers before Superintendent Intake Meeting.*)
2. Overview: Six Steps to Strategic Plan Development (Domain One Step-by-Step)
3. Overview: Strategic Thought, Design, and Continuous Improvement (Domains One – Six)
4. The MoakCasey Strategic Plan Development Process Checklist
5. Primer: Assembling Your Strategic Planning Team
6. Step #1 Primer: Superintendent Listening & Learning Tour
7. Board Posting Language Included Below Each Meeting

### Begin Superintendent Listening & Learning Tour (Step #1)

#### Meeting: Superintendent Intake with MoakCasey

<input type="checkbox"/>	Participant	Superintendent
	Time Allotment	1 hour (Zoom)
	Deliverable	Review Intake Questionnaire, Preliminary SWOT Analysis, Set Calendar
	Misc. Tips	Begin with the End in Mind – Where do you want your district to be, when, and what resources need to be mustered?

### Month 1 (Recommend Scheduling Meetings 1 – 3 on back-to-back days)

#### Meeting #1: TEAM Trust & Good Governance Inventory (Step #2)

<input type="checkbox"/>	Participants	Strategic Team: Superintendent and Board of Trustees (TEA Authorized Provider: 3 hours of “Team Building” Board Training Provided)
	Time Allotment	3 hours
	Post Language	Hold Team Building Training as required by statute provided by MoakCasey, LLC. To include introduction to Strategic Planning Process.
	Deliverable	TEAM Trust Self-Analysis Questionnaire
	Misc. Tips	Schedule evening of 1 <sup>st</sup> Day: Be prepared to explain succinctly why and why now to your Board and any public in attendance

#### Meeting #2: Advancing the Senior Leadership Team Awareness of the Balanced Scorecard (Step #5)

<input type="checkbox"/>	Participants	Tactical Team: Superintendent and Senior Leadership Team
	Time Allotment	2 hours
	Deliverable	Balanced Scorecard Rough Draft
	Misc. Tips	Schedule morning/afternoon of 2 <sup>nd</sup> Day

#### Meeting #3: Setting the Belief(s) Statement with the Board & Community (Step #3)

<input type="checkbox"/>	Participants	Strategic and Tactical Teams with Community Advisory Committee (TEA Authorized Provider: 3 hours of “TASB Framework IV: Advocacy and Engagement” Board Training Provided)
	Time Allotment	3 hours
	Post Language	Hold Advocacy & Engagement Board Training provided by MoakCasey, LLC. To include Setting the Beliefs Statement with the Community.
	Deliverable	Setting the Belief(s) Statement
	Misc. Tips	Schedule evening of 2 <sup>nd</sup> Day

**Month 2 (Recommend Scheduling Meetings 4 – 6 on back-to-back days)**
**Meeting #4: Setting the Mission/Vision Statements with the Board & Community (Step #4)**

<input type="checkbox"/>	Participants	Strategic and Tactical Teams with Community Advisory Committee (TEA Authorized Provider: 3 hours of “TASB Framework I: Vision and Goals” Board Training Provided)
	Time Allotment	3 hours
	Post Language	Hold Vision & Goals Board Training provided by MoakCasey, LLC. To include Setting the Mission/Vision Statements with the Community.
	Deliverable	Setting the Mission & Vision Statements
	Misc. Tips	Schedule evening of 1 <sup>st</sup> Day (Invite Senior Leadership Team and aspiring administrators.) Prior to meeting, review rough draft of Belief(s) Statement.

**Meeting #5: Advancing the Senior Leadership Team Awareness of the Balanced Scorecard, cont’d (Step #5)**

<input type="checkbox"/>	Participants	Tactical Team: Superintendent and Senior Leadership Team
	Time Allotment	2 hours
	Deliverable	Balanced Scorecard 1st Draft
	Misc. Tips	Schedule morning/afternoon of 2 <sup>nd</sup> Day

**Meeting #6: TEAM Trust & Good Governance Inventory, cont’d (Step #2)**

<input type="checkbox"/>	Participants	Strategic Team: Superintendent and Board of Trustees (TEA Authorized Provider: 3 hours of “Balanced Scorecard and EISO Alignment” Board Training Provided)
	Time Allotment	3 hours
	Post Language	Hold Team Building and Evaluating and Improving Student Outcomes (EISO) Training as required by statute provided by MoakCasey, LLC. To include introduction to the Balanced Scorecard.
	Deliverable	Good Governance Inventory and Board Balanced Scorecard
	Misc. Tips	Schedule evening of 2 <sup>nd</sup> Day (Approximately one-month after Meeting #1)

**Meeting #7: Board Adoption of the Balanced Scorecard (Step #6) (Optional MoakCasey attendance)**

<input type="checkbox"/>	Participants	Strategic Team and Community Advisory Committee
	Time Allotment	10 minutes
	Deliverable	Balanced Scorecard (Belief(s)/Mission/Vision/Four Perspectives/Critical Success Factors)
	Misc. Tips	Agenda item on regular board meeting date not to exceed 15 minutes.