Orientation

Essential Question:

Who is in the room and what are we charged to do? The Orientation is for team members to get to know one another. It is an opportunity to be familiar with the strategic plan process. It is an opportunity to review commitments plan team members must make.

Outcomes: The Orientation is an opportunity for the strategic plan team to learn of their roles and responsibilities. It is a chance to begin to develop relationships with plan team members.

- Learn who is on the strategic plan team.
- Learn about the strategic plan process.
- Learn about roles and responsibilities of the strategic plan team.
- Learn about roles and responsibilities of the core team.
- Learn about the strategic plan that has been in existence for the past several years.
- Preview another district's strategic plan.

Time Allocation:

90 minutes (usually in the evening from 6:30-8:00 p.m.).

Product:

The Orientation Meeting paints the "Picture" of the Strategic Planning process so that all team members have a shared understanding of the process and their roles and responsibilities in helping the district set clear direction for the future.

District Responsibilities:

- The district assists in following the process to select members of both the strategic plan and core teams.
- The district prepares a short report summarizing the state of the current strategic plan.
- The district ensures that all plan team members understand the importance of attending all team meetings.

Data Retreat

Essential Question:

Where are we now? How would you describe what is working and what needs attention in the past and present? What are the strengths, weaknesses, opportunities and threats as described by data, information and perceptions? What does the data picture look like today?

Outcomes: The Data Retreat provides an opportunity for the Strategic Plan Team to review the following data sources:

- Results of the Environmental Scan/System Assessment
- Academic/Achievement/Learning data
- Human Resource/Personnel data
- Learning Environment data
- Social/Emotional Student data
- Demographic data (student and community)
- Financial data (district)
- Satisfaction/Climate data (student, family, staff, community) such as the 5Essentials

Note: Trend, comparative, and cohort data are optimal, where possible.

Time Allocation:

6 hours (usually from 8:00-3:00 p.m. during the work day.) Usually 2-3 weeks following the Orientation Meeting.

Product:

The Data Retreat allows the Strategic Plan Team to know strengths, weaknesses, opportunities and threats, and to capture baseline data so a new vision can be established. The SWOT describes the current state of the district and answers the question, ***"Where are we now?"***

The SWOT is then shared with stakeholder groups between the Data Retreat and the Vision Retreat to solicit feedback. The feedback is reviewed at the next meeting of the team.

District Responsibilities:

The district assists CEC in collecting and organizing the feedback from stakeholders for the plan team review of the Environmental Scan data.
The district organizes and presents data reports and each report is approximately 40 minutes:

- Academic Data: Student growth and achievement
- Learning and Working Environment: Culture and climate
- Resources: Financial, Facilities and Technology

Community Engagement

Essential Question:
Do internal and external stakeholders believe we are on the right track? What do you think about the draft SWOT analysis? What suggestions do you have to improve the draft materials? Do you believe this plan will help the district reach its mission and vision?

Outcomes: Community engagement provides an opportunity for the Strategic Plan Team to reflect on their work and ensure they are on the right track in representing the beliefs and feelings of the internal and external communities through the following:

- Staff engagement sessions
- Parent and community engagement sessions
- Student focus groups (if selected)
- Specially designed surveys to gather feedback from internal and external stakeholders
- Neutral third-party survey analysis
- Summarizing reports for the strategic plan team

Time Allocation for Engagement Sessions:
6 hours (usually a session lasts no more than 1.5 hours but to save the district money, a staff session is held in the afternoon typically at around 3 p.m. and a community session in the evening somewhere between 6-7:30 p.m.) Usually this occurs 2-3 weeks following the Data Retreat. A survey also is offered for those unable to make engagement sessions.

Time Allocation for Draft Plan Survey:
A survey is completed following the Setting Direction Retreat as well. This usually occurs 2 weeks after the Setting Direction Retreat and is typically open at least one week.

Product:
After the community engagement and first survey, a report is created on the findings that is used by the plan team during the first hour of the Vision Retreat to make changes to the SWOT.

After the second survey, a report is created on the findings that is used by the plan team during the Final Meeting of the Team to make changes to the draft strategic plan.

District Responsibilities:
The district promotes the community engagement sessions and the surveys. The district reviews the reports prior to being shared with the public to ensure interpretation of district-specific information was correctly represented.

Vision Retreat

Essential Question:
Where do we want to be? What are our best hopes for the future? How do we want to be different in 5 years? What is the preferred future?

> **Outcomes:** The Vision Retreat provides an opportunity for the Strategic Plan Team to invent the future to identify how the district will look, feel and sound differently several years ahead.
>
> - Revisit the current Strategic Plan to reflect on mission, vision, and core values/commitments
> - Develop a shared understanding of a continuous improvement framework and the research-based effective practices of a high performing organization
> - Examine impact of future mandates and legislation
> - Investigate possibilities for moving the district to a high level of performance
> - Draft a Preferred Future Statement that describes how the district will be different at the end of the strategic plan life.

Time Allocation:
6 hours (usually from 8:00-3:00 p.m. the during work day. Usually 3-4 weeks following the Data Retreat, more if the district chooses to complete community engagement sessions.

Product:
The Vision Retreat allows the Strategic Plan Team to revisit mission, vision and values. It focuses on culture and relationships. The Preferred Future Statement describes the future state of the district and answers the question, "***Where do we want to be***?"

The Preferred Future Statement is then shared with stakeholder groups between the Vision Retreat and the Setting Direction Retreat to solicit feedback. The feedback is reviewed at the next meeting of the team.

District Responsibilities:
The district assists CEC in collecting and organizing the feedback from stakeholders for the plan team review of the SWOT analysis.
The district assists CEC to organize and select resources for the strategic plan team to investigate innovation, change theory, creativity, and research-based practices.
The district assists CEC with an understanding of the current mission, vision and values of the organization.

Setting Direction Retreat

Essential Question:

How will you get from where you are to where you want to be? What will everyone do differently to get improved results? What research-based strategies will everyone implement with fidelity? How will what we do drive professional development planning and implementation? How will what we do drive the use of district resources?

Outcomes: The Setting Direction Retreat provides an opportunity for the Strategic Plan Team to make decision related to goals and high-leverage strategies. What are the Priorities?

- Examine current long-range goals.
- Establish future long-range goals.
- Preview Key Performance Indicators for current long-range goals,
- Provide input into Key Performance Indicators for future long-range goals.
- Identify high-leverage strategies to focus district work for the duration of the plan.
- Prioritize high-leverage strategies.
- Align high-leverage strategies to the future long-range goals.

SMART Goals

S = Specific
M = Measurable
A = Achievable
R = Relevant
T = Time-Bound

Time Allocation:

6 hours (usually from 8:00-3:00 p.m. during the work day). Usually 3-4 weeks following the Vision Retreat Meeting.

Product:

The Setting Direction Retreat allows the Strategic Plan Team to identify and prioritize critical goals and strategies to move the district closer to achieving its mission and vision. The Strategic Plan Draft describes provides a first look at the new, evolving strategic plan and answers the question, "***What will we do to move us from where we are to where we need to be to achieve our mission and vision***?"

The Strategic Plan Draft is then shared with stakeholder groups between the Setting Direction Retreat and the Final Meeting of the Plan team to solicit feedback. The feedback is reviewed at the last meeting of the team.

District Responsibilities:

The district assists CEC in collecting and organizing the feedback from stakeholders for the plan team review of the Preferred Future Statement.
The district will assist CEC in the first draft of Key Performance Indicators.
The district will ensure that any major projects that are currently unfinished are incorporated into the discuss of high-leverage strategies.

Final Meeting of Strategic Plan Team

Essential Question:

What final changes need to be made in the plan to reflect patterns of stakeholder feedback? What will make the plan better? What will make the plan clearer? What changes should be made that are supported by data and evidence?

Outcomes:
The Final Meeting of the Strategic Plan Team is an opportunity to make any refinements to the draft of the plan before it is given to the superintendent who will recommend plan approval to the board of education.

- Examine staff feedback.
- Examine parent feedback.
- Examine community feedback.
- Examine board feedback.
- Examine management team feedback.
- Examine union feedback.
- Examine parent organization feedback.
- Examine student feedback.
- Make final refinements, additions or deletions to the plan draft.
- Ready the plan for the superintendent to present to the Board of Education for approval.

Time Allocation:
3 hours (usually from 9:00 am-12:00 or 1:00-4:00 p.m. during the work day). Usually 2-3 weeks following the Setting Direction Retreat Meeting.

Product:
The Final Meeting of the Strategic Plan team allows the Team to reflect on stakeholder feedback to make additions, deletions or refinements in the plan draft. This meeting answers the question, "***What if any changes need to be made in the strategic plan draft to improve the recommendation***?"

The Strategic Plan is then taken by the superintendent to the Board of Education for approval. The strategic plan team is invited to attend the board meeting.

District Responsibilities:
The district assists CEC in collecting and organizing the feedback from stakeholders for the plan team review of the draft of the new Strategic Plan.

Selecting the Strategic Plan Team

1/3 Staff……. 1/3 Parent and Community   ……. 1/3 Management Students

Stakeholder Group	Number	Suggested Selection
Board of Education	2	Board
Superintendent	1	Superintendent
Key members of the Superintendent's Cabinet	2-3	Superintendent
Building Leadership	2-3 per level: elementary, middle, high	Principals
Union Leadership	1 per organization (Certified staff, Support staff, etc.)	Union(s)
Parent Organization Leadership	1-2 from all Parent Organizations	Parent Council or Superintendent and Board
Family Representatives	1 per school or, depending on district size, 3-4 from elementary, 3-4 from middle, and 3-4 from high school	Parent Teacher Organization
Community Representatives	3-5	Superintendent and Board
School Representatives	1 per school or, depending on district size, 3-4 from elementary, 3-4 from middle, and 3-4 from high school	School Leadership Teams
Student Representatives in K-12 districts	6-8	Student Council

The responsibilities of the planning team members include:

- Attend all meetings of the planning team.
- Prepare for each meeting by reading materials aligned to each agenda.
- Conduct a data SWOT analysis of the district by reviewing key data indicators and measures to determine the district's strengths, weaknesses, opportunities and threats.
- Develop a shared understanding of the needs of stakeholder groups through a review of an environmental scan or stakeholder satisfaction data.
- Explore educational, demographic, political, economic, social, and technological impacts on the future of the district.
- Explore research-based, effective practices of high performing districts.
- Review and revise the district's shared mission, vision, values/commitments and goal.
- Provide suggestions for indicators and measures for long-range goals to define district success.
- Identify key strategy gaps that identify what the district needs to do differently to improve its results over the duration of the plan.
- Present a draft of the plan for stakeholder review and input.
- Revise and finalize the draft of the plan based on stakeholder review and input.
- Recommend the strategic plan to the superintendent.
- Learn about the responsibilities to live the Plan.

Selecting the Core Team

Stakeholder Group	Number	Suggested Selection
Board of Education	1	Board
Superintendent	1	Superintendent
Key member of the Superintendent's Cabinet	1	Superintendent
Building Leadership	1	Principals
Staff Leadership	1	Staff
Parent Organization Leadership	1	Parent Council or Superintendent and Board

The responsibilities of the core team members include:

- Be members of the strategic planning team and assume all responsibilities expected of team members.
- Attend an initial strategic planning meeting to finalize customization of the process for the district.
- Attend virtual 30-40 minute meetings one week prior to each meeting of the strategic plan team.
- Make decisions to finalize each agenda for the strategic planning team.
- Provide feedback related to the process to the facilitator(s).
- Attend a final meeting to learn of ways to live the plan. Others may be invited to this meeting.

Seeking Feedback from Stakeholders

A key component of the Strategic Planning process is to continually go back to constituent groups for reactions to, and comments upon, the Strategic Plan Team's work. This is to ensure the work is truly district-wide, representing the perspectives of all groups concerned. It also provides for stakeholder ownership in the planning process and ensures there will be little surprise when the recommendations are finalized. At three points in the process, the Strategic Plan Team decides, with the assistance of the Facilitator/Consultants, how to solicit stakeholder feedback:

- Between the Data Retreat and the Vision Retreat
- Between the Vision Retreat and the Setting Direction Retreat
- After the development of the draft Strategic Plan (one page)

The Strategic Plan Team's work from each Retreat will be captured within 48 hours by the Facilitator/Consultants, who will produce a common summary document that will be the document to share with constituent groups for reaction and feedback. By design, each Strategic Plan Team Retreat is a month apart from the previous Retreat, allowing team members a minimum of two weeks to gather feedback and submit it to the Site Coordinator. The Site Coordinator and Facilitator/Consultants will organize the feedback and input and determine the method for reporting it to the Strategic Plan Team at its next Retreat. This component can be enhanced with an additional partnership with CEC where the community engagement is expanded.

There are several options for seeking feedback and input within this proposal. Those options can be expanded with an additional partnership:

- **Partner with CEC to conduct Community Engagement and Create Surveys:** See detailed information on overview sheet about community engagement and surveys provided by CEC.

  In addition, or if the decision is made not to utilize CEC for community engagement:
- **Staff (Administrators, Teachers and School Support Personnel):** A formal option is to seek feedback at a staff meeting. This provides a captive audience and ensures more participation in the feedback process. The staff would have an opportunity to review the documents at the end of each Strategic Plan Team meeting and to provide feedback and input through post-it-notes, Gallery Walk, Plus/Delta, posters, etc. Other options for staff could include a survey. Additionally, grade level/department teams could review the documents and provide input at team session designed for this purpose.
- **Board members:** Board of Education representatives on the Strategic Plan Team should take the products from each meeting back to a board meeting for feedback and response. It is imperative that board members have input along the way rather to wait until the end. The board has the responsibility to approve the plan.
- **Parents and Community:** These stakeholders can participate in a variety of parent and community organization meetings, specially scheduled parent and community Single Topic Forums, and surveys to provide feedback.
- **Students:** Surveys and forums with representative students from the high school provides for feedback or discussion.

EXAMPLE OF A SWOT ANALYSIS FROM THE DATA RETREAT

STRENGTHS: What do we consider to be our strengths? What advantages do we have? What do others say our strengths are?

- Financial stability
- Staff- highly qualified and dedicated
- Technology
- Restoring programs that were lost due to budget reductions
- High school graduation rate increasing
- Pride
- Safety
- Middle and High School extra-curricular activities; clubs
- Dual Language, STEM, Running Start program choices
- New leadership

WEAKNESSES: What do we consider to be our weaknesses? What are we most criticized for or receive the most complaints about? What do we seem to have a hard time doing well?

- Trust/ morale
- Communication
- Collaboration
- Shared decision-making; input
- Alignment of assessment and differentiated instruction to newly establish K-12 curriculum
- Student Achievement Gaps; underperforming schools
- Intervention and enrichment systems
- AP tests, scores or 3 or higher
- Low test scores
- Inconsistent procedures and practices
- Low income programs and services
- Student engagement
- Professional development
- Parent involvement
- Aging facilities

OPPORTUNITIES: What opportunities for improvement do we know about, but have not addressed? Where with a little work could we change a weakness into a strength?

- Student-centered, personalized learning
- Preparation for life "Whole child"
- Social/emotional curriculum and supports
- Data systems for progress monitoring and reporting
- Customer service
- Math supports
- Staffing diversity
- Labor-management relationships
- Program evaluation
- Time, schedule, day, extended day, year, summer
- Debt management

THREATS: Who or what threatens us the most? What challenges are coming that we must respond to? What might block our progress?

- State finance
- Student changing demographics
- ESSA
- Pension Reform
- Prospective Employee Pool
- Student enrollment
- Community growth
- Social media; social issues

Living the Strategic Plan

<u>Critical strategies that CEC offers to ensure the return on investment include:</u>

1. Align goals and strategies to a data system	•Identify key indicators, measures, and targets for all goals and strategies.
2. Align the data system to a progress monitoring and reporting system for all stakeholders.	•Progress monitor and report growth and achievement while making adjustments to ensure improved results.
3. Align the Plan to individual and team performance and program evaluation	•Align individual, team, school, and program goals and feedback to the data system.
4. Align the Plan to the work structures and shared decision-making processes	•Align the plan to school, team, department and program structures and processes to ensure ownership, responsibility and accountability.
5. Align the Plan strategies to PDSA action plans	•Make sure strategy actions plans follow a consistent SMARTprocess *to develop a two-way collaborative communication system*
6. Align the Plan to resources of time and money	•Align budget and meeting agendas to the Plan in order *to ensure focus and priority.*

1. Align goals and strategies to a data system (Indicators, Measures, and Targets). A data system must be developed to ensure everyone can determine at any point what is working well and what needs attention. The system must align essential indicators and measures from the classroom to the boardroom. The data system must ensure everyone in the system can connect their work to see how their performance impacts organizational performance. For all indicators and measures, there must be targets set to ensure clear and specific understanding of what improvement is expected for goal accomplishment. A data dashboard or scorecard system that is simple yet significant is essential to making the Plan's goals and strategies come alive.

2. Align the data system to a progress monitoring and reporting system for all stakeholders. Both progress monitoring and reporting keep the Plan's focus before its stakeholder groups. It is critical to celebrate accomplishments and identify opportunities for improvement throughout the Plan's duration. It is imperative that everyone involved in a project understands from the outset what their work is, how it fits into the project as a whole, and to whom they will be reporting. But it is equally important that there be mechanisms by which their feedback is factored into the planning and project processes, particularly as changes in circumstances require. Quarterly check-ins and annual reports, celebrating accomplishments and making adjustments to opportunities for improvement at all levels, are critical.

3. Align the Plan to individual and team performance and program evaluation (goal setting, feedback, reflection, improvement). Evaluation growth and improvement goals must align with the Plan's data system. New requirements for evaluation and student growth must connect with the Plan's goals and data system. Be certain that key indicators, measures and targets align to the ways the superintendent and his/her cabinet are

evaluated. Be certain that key indicators, measures and targets align to the ways building leaders are evaluated. Be certain that key indicators, measures and targets align to the ways teachers and other certified staff are evaluated.

4. Align the Plan to ~~the~~ work structures and processes to ensure ownership, responsibility and accountability. Schools must examine data that aligns to key indicators and measures of the district Plan's long-range goals. From those key indicators and measures, the school must set its own targets. Teams must do the same. Because indicators and targets for all the district, schools and teams are the same, when schools and teams improve~~,~~ the district improves. Schools and teams must also implement the Plan's strategy-based action plans, which need to be clear and direct in their requirements and expectations, yet allow for local flexibility in their application. If action plans are too complex~~ity~~, team members cannot reasonably be expected to carry them out as intended. Ownership and commitment to action plans occur when teams and schools make decisions about how they, within their own unique educational settings, will address those action plans to achieve the district's mission, vision and goals. This makes team and school ownership critical because it is at the school and team level that the Plan's execution matters.

5. Align the Plan's strategies to PDSA action plan steps to develop a two-way communication and collaboration system by which to continually listen and learn. Use a Plan-Do-Study-Act action planning process. Train leaders of the action teams to ensure the PDSA process is consistently used. Be certain action plans are SMART.   Align key action plan responsibilities to district department leaders and shared decision-making committees. Be certain those impacted by the action plans have opportunities to provide into input to their design and development. Be certain the action plans identify tasks that are research-based and ensure actions taken will be different from what has previously been done since doing the same things produce the same results. Recognize the importance of addressing with efficacy "study" and "act" in the PDSA process.

6. Ensure focus and priority by aligning the Plan to resources of time and money. The board's and administrative team's monthly agendas should include a focus on the Plan's implementation. Keep the mission and vision at the forefront. It is imperative that everyone in the organization reflects continuously on the mission and vision of the district. Make sure everyone knows when a data point for a key indicator, measure and target has changed. Celebrate when the data point is positive and trending in the right direction. Make adjustments when the data point is negative or flat-lined. Align the district's budget to be certain priorities are supported with fiscal resources. Align the district's support system to be certain Plan priorities are focused and supported with resources of people and time.

Strategic Management System

Strategic Plans Developed with CEC as a Partner are embedded in the Strategic Management System developed by the Strategy Management Group's Scorecard Institute. CEC Facilitators of this process have been certified through their process. This system is based on being able to answer two essential questions:

- **Are we doing things RIGHT as an organization?**
- **Are we doing the RIGHT things as an organization?**

The first is operational, the second strategic.

This system further allows an organization to assess the growth and performance aligned to the dimensions of the strategic management system. It further allows the organization to benchmark its performance across districts or central office departments within a district to learn from one another to accelerate action and build capacity.
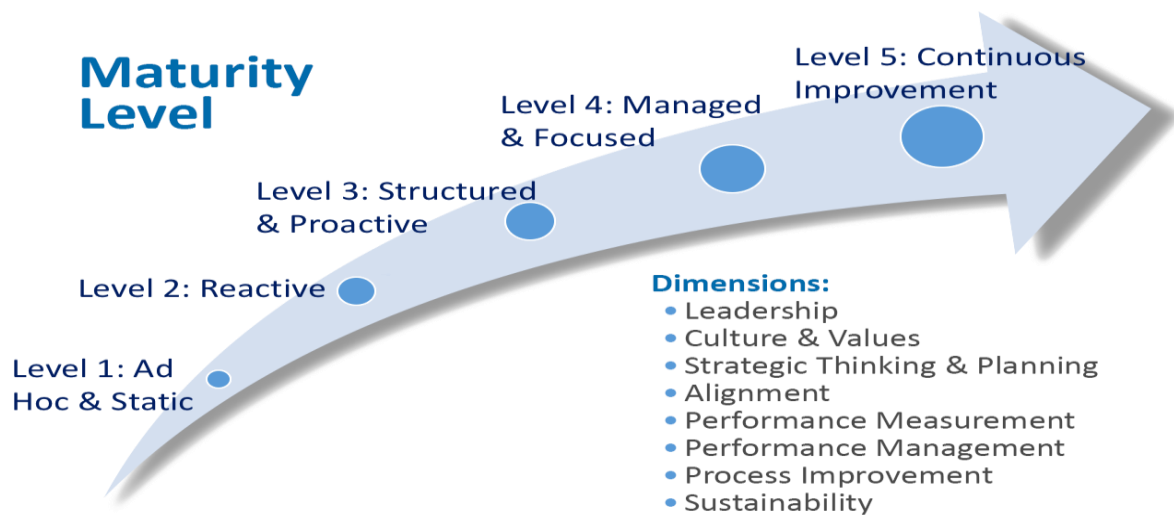
It recognizes that the return on investment of establishing a strategic plan rests on the organization's ability to execute strategic to get better results.

The Strategic Management System is built around five most important factors to successfully execute strategy

1. An **accountability model** must be clearly defined and embraced for each element of the strategy.
2. The organization-wide **strategy must be effectively cascaded down into the business units, support functions, teams and individuals down through the organization.**
3. **Adequate resources (time, budget, skills and capacities**) must be available.
4. Managing change on a consistent and professional basis is vital**. Change management is the primary responsibility of the executive leadership team.**
5. Establishing a **performance culture** is a fundamental requirement for effective implementation and a frequent failure point in many strategic planning and management processes

A Management assessment allows the organization to assess its current performance aligned to the 8 dimensions of the system with five levels of maturity:

Level 1. Ad Hoc and Static

Level 2. Reactive

Level 3. Structured and Proactive

Level 4. Managed and Focused

Level 5. Continuous Improvement

Maturity Level

Level 5: Continuous Improvement

Level 4: Managed & Focused

Level 3: Structured & Proactive

Level 2: Reactive

Level 1: Ad Hoc & Static

Dimensions:
- Leadership
- Culture & Values
- Strategic Thinking & Planning
- Alignment
- Performance Measurement
- Performance Management
- Process Improvement
- Sustainability

The eight dimensions listed in the figure above define the components of the management system. Strategic Thinking and Planning are one of the dimensions.
We begin our process by assisting the organization assess its strategic management system.

**Top Ten Reasons for
Using CEC's Strategic Planning Process**

Number	Reason
10	One page plan with supporting documents keeps it "big and simple."
9	Sets clear focus and priorities. Sets direction for operational action planning.
8	Sets direction for operational action planning. Identifies strategies for improvement.
7	Defines commitments and non-negotiables. Establishes what we all need to do well together.
6	Based on a clear understanding of the data system that provides evidence of what is working and what needs attention.
5	Based on a vision for the future that is reflective of research-based practices.
4	Determines gaps between current performance (where we are) and preferred future performance (where we want to be).
3	Includes stakeholder participation to ensure collaboration and ownership.

2	Defines how we measure success through goals, indicators, measures and targets.
1	Ensures a process that brings the plan to life once approved through alignment with leader and teacher performance evaluations, meeting agenda, and progress monitoring and reporting dashboard system.

Most Recent References for Strategic Planning:

Superintendent	District
Jay Marino	Antioch District 34
Kevin Jauch	Avoca District 37
Lisa Hichens	Batavia District 101
Scott Wakely	Bradley Bourbonnais District 307
Kathy Hinz	Crystal Lake District 47
Paul Hertel	Des Plaines District 62
Mary Hendricks-Harris	Francis Howell District- St Charles, MO
Bruce Law	Hinsdale District 86
Kaine Osburne	Lake Zurich District 95
Larry Hewitt	Northbrook District 28
Ed Condon	River Forest District 90

Perry Soldwedel: Perry serves as a   coach/ consultant to school district leaders as they strive to move their organization to a high level. He also leads external review teams at both   the district and school levels to provide organizations with feedback related to continuous improvement best practices. He assists school districts across the country create systems where shared accountability and collaboration drive improved performance results. His expertise is in the areas of systems thinking, shared leadership and accountability, Strategic Planning, data collection/measurement/ information/analysis, customer service, and alignment of standards/assessments/instruction.

He is the author of the ***School Board Fieldbook: Leading with Vision*** (2009) Solution-Tree with Mark Van Clay and ***Aligning Districts as PLCs***: Solution-Tree (2011) with Mark Van Clay and Thomas Many. In addition, he has contracts currently working with Solution-Tree, Quality Leadership Design and Strategic Learning Initiatives.

Perry is a past school district superintendent, assistant superintendent for curriculum and instruction, technology director, principal, assistant principal and elementary/ middle school teacher all in the state of Illinois.

Perry's specific skills and experiences related to facilitation of District Strategic Plans:

- Certified Baldrige Examiner (Ability to facilitate a process to articulate outcome measures for each major goal/priority.   )
- Certified Strategic Plan Facilitator: Cambridge Management, Studer Group (Ability to provide a Strategic Planning framework that delivers both high level goals/priorities as well as a scorecard for ensuring board/district accountability.)
- Provided facilitation/consultation to more than 35 districts in Illinois and 30 in other states in systems thinking (Content knowledge in key trends and innovations in k-12 education)
- Facilitator/Consultants Contracts: Consortium for Education Change, Solution-Tree, American Society for Quality, Gates Foundation, Joyce Foundation, Illinois State Board of Education, Chicago Public Schools, Quality Leadership Design (Ability to provide an external perspective and strategic thought leadership)
- Presenter: Presenter: numerous state and national education and business conferences.

- Curriculum, Assessment, Instruction Leadership: Board of Directors for Association for Supervision and Curriculum Development
- Consultant IBM: Superintendent of an IBM Beta Test Site District (identifying and distilling the qualitative and quantitative data/research)
- Health Care: Board of Trustees, President: Baldrige award winning hospital
- Superintendent: Baldrige award winning School District. District received three US Department of Education Blue Ribbon School Awards. District received US Department of Education Technology Challenge Grant Award and ITTE's National Technology School District of the Year Award. District was a Professional Development School with Illinois State University: (Current on trends in education)
- Core Service Director for Systems Thinking at the Consortium for Educational Change (Ability to drive creation of a concise planning document that can be used to engage, communicate and monitor implementation success.)
- Designs and implements scorecards and dashboards for school districts. (Ability to facilitate a process to articulate outcome measures for each major goal/priority.   Ability to provide a Strategic Planning framework that delivers both high level goals/priorities as well as a scorecard for ensuring board/district accountability.)
- Experience in Public Education. He spent his career in Pekin Public School District 108, a K-8 elementary system in suburban Peoria, IL. He taught sixth grade for four years. He served as an assistant principal at a middle school for two years. He served as an elementary principal for four years. He served as a Director of Curriculum for two years. He served as Assistant Superintendent for Curriculum and Instruction for 12 years. He served as Superintendent for 10 years

Perry holds degrees from the University of Illinois, Bradley University and Western Illinois University. He is an adjunct professor with the University of Illinois in the continuing education area where he teaches "Quality Improvement in Education."