



Community-Driven Strategic Planning

District Leadership Forum

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1) Executive Summary

Key Observations

Contract a third-party vendor to provide comprehensive strategic planning support. Contacts at each profiled district highly recommend contracting a vendor to facilitate the strategic planning process. Vendors have experience facilitating strategic planning for school districts, which proves essential when managing the complex, nuanced process. Further, vendors bring outside objectivity and candor to strategic planning, which contacts report as valuable. Strategic planning vendors work in conjunction with district steering committees to lead the strategic planning process. Vendors design districts' strategic planning process, lead steering committee meetings, conduct research and community engagement, and often write the first draft of the district's strategic plan. Nonetheless, administrators at profiled districts report that their vendor-facilitated strategic plan reflects their district's unique context. Contacts explain that vendors do not generate the *content* of the plan—only the process used to generate the content.

Seek out underrepresented community voices throughout the strategic planning process. Administrators at profiled districts worked to include stakeholder groups that might otherwise not participate in the strategic planning process to ensure that all community groups could help determine the district's future. At District A, administrators recruited staff from departments across the district including members from the nutrition and custodial teams to serve on their steering committee. Administrators at District B conducted personalized phone outreach to the Hispanic community at their district to ensure that members of that community felt welcome at and attended the district's community forum.

Research community perspectives and priorities to identify and refine strategic goals. Contacts at all profiled districts stress the importance of vigorous, representative community engagement during the strategic planning process. Community engagement ensures that the district's plan aligns with the priorities of the community at large. Further, it ensures that each stakeholder group feels heard. Profiled districts use a combination surveys, community forums, focus groups, and interviews to research their community's priorities and perspectives. Profiled districts research community perspectives both before identifying goals and while refining the goals and supporting objectives.

To drive impact through strategic plan, promote ownership and accountability. Strategic plans live and die by implementation. Strategic plans all too often become shelf documents that fail to drive impact. To ensure strategic plans drive impact, administrators should promote plan ownership. At District A and District B, the steering committee assigns each goal to a senior district administrator. This senior administrator, referred to as the goal manager, must achieve the strategic goal's objectives and tasks, as measured by the goal's metrics. In addition, administrators at District B, District C, and District D regularly present strategic plan progress to their school board to keep themselves accountable for achieving strategic plan items.

2) Launch a Strategic Plan

Overview

Develop Strategic Plan that Aligns with Mission, Vision, Values, and Community Priorities

Each of the five districts profiled in this report, District D, District C, District B, District E, and District A, approached strategic planning similarly. Administrators at each district used a process to build a community-driven strategic plan that aligns with the district's mission, vision, values, and community priorities. See the archetypal strategic planning process below. Normally, steering committees drive the strategic planning process through a series of meetings over the course of one school year.

Steps in the Strategic Planning Process



1 Steering committee

Convene a steering committee to drive strategic planning process.



2 Mission, vision, and core values

Articulate district's reason for existence, aspirations, and guiding principles. The school board typically completes this step.



3/4 Research and Community Engagement

Benchmark district's current status against community's perspectives and priorities to inform district aims.



3/4 Goals

Identify aims of the district that align with the district's mission, vision, and values and desired future position of district community.



5 Objectives, tasks, and metrics

Define how the district will operationalize and measure district goals.



6 Implementation and progress monitoring

Execute tasks and track and communicate district progress



Steering Committees

Identify and Recruit a Diverse Selection of Community and District Representatives to a Steering Committee to Ensure Broad Engagement

Administrators at District C, District D, and District A chose to convene steering committees representative of their district organization and their communities. These committees range from 30-70 members. While these committees are large, contacts stress the importance of involving each stakeholder group from across the community

(e.g., parents, local business leaders) and within the district organization (e.g., building administration, custodial team members). These committees included senior district leadership as well.

To ensure the academic department does not dominate the strategic planning process, recruit staff from a variety of departments to the steering committee. For example, administrators at District A recruited members from the nutrition and custodial teams.

At District D, administrators sought to include at least two staff members from each building in the steering committee. To identify and recruit district staff to their steering committee, District D administrators used the following practices.

- **Staff Recommendations.** District administrators asked building administrators to recommend building staff to participate in the steering committee.
- **District-Wide Staff Application.** District administrators sent out a steering committee application to all staff. This application included several open-ended questions and demographic indicators.
- **Ensuring Diversity.** Once administrators received the recommendations and applications, they outlined each candidate's position (e.g., art teacher), building, race, ethnicity, gender, and grade level on sticky notes. They picked candidates to ensure that they had adequate representation in each of these areas. Similarly, contacts at District A picked staff that represented a diverse range of opinions, diverse professional experience, and diverse skillsets.

To identify and recruit community members to join their steering committee, administrators at District C completed the following. See below for the district's committee membership.

- **District-Wide Survey.** Administrators sent out a district-wide Google Forms survey asking community members whether they would like to join the district's steering committee. The survey briefly explained the strategic planning process and indicated the required availability (i.e., described the dates and times the committee would meet). The survey asked recipients about their relationship to the school and to which school level they were affiliated (e.g., elementary, middle).
- **Ensuring Broad Representation.** Once administrators received responses, administrators picked candidates who represented each of the following community sectors: government, information, finance, public health and human services, education, families, community- and faith-based organizations, legal, and students.

Steering Committee Membership at District C

Adapted from District C's Strategic Plan¹



19 Members From Within the District

- Three senior district administrators
- Two school board members
- Two building principals
- One education specialist – school counselor
- One education specialist – school psychologist
- Two education specialists – other
- One instructional technology specialist
- One special education specialist
- Two elementary school teachers
- Two middle school teachers
- Two high school teachers



19 Members from Outside of the District

- 10 parents
- Two students
- Four business representatives
- Three community representatives



Target Outreach to Local Community Organizations

To ensure representation from all community groups on steering committees, administrators at District D reached out to local community groups that administrators expected would otherwise not join the steering committee. Specifically, administrators at District D reached out to the local mosque, local church groups, local community organizations (e.g., local chapter of the NAACP), and local government bodies (e.g., department of health) to request their participation. Similarly, District C administrators reached out to local government officials to request their participation.



To Maximize Efficiency, Consider Forming a Smaller Steering Committee of District Leaders

If administrators convene small, less representative steering committees, they should spend additional time on the community engagement step.

Contacts report a tradeoff between steering committee size and efficiency. The larger (and more representative) the steering committee, the less dynamic. Smaller steering committees can make decisions or revisions to the strategic plan without scheduling a 40-70-person meeting. As such, administrators at District E convened their senior district leadership with only a few additional members to serve as their steering committee. See their committee membership below. Similarly, District B's superintendent's cabinet effectively serves as the district's strategic planning committee.

1) "Strategic Plan," District C, accessed November 23, 2020.

District E Steering Committee Membership

|  District Administrators |  Other |
|---|---|
| <ul style="list-style-type: none">• Superintendent• Members of superintendent's transition team• Chief academic officer• Director of primary education• Director of secondary education• Director of pupil services• Director of exceptional children• Executive director of communications and engagement | <ul style="list-style-type: none">• IB coordinator (teacher)• Teacher's union president• Diversity, equity, and inclusion consultant (now director of DEI)• PTO council co-president• School board member• Several parents |

Vendors

Contract a Third-Party Vendor to Provide Comprehensive Strategic Planning Support

Contacts at all profiled districts report that their vendor-facilitated strategic plan reflects their district's unique context. While vendors design the strategic planning process, they do not generate the content of the plan. The steering committee—along with the community—determines the content of the plan, even if the vendor writes the first draft. Contacts warn that administrators must follow the community engagement process carefully to engender the feeling of district ownership.

Contacts at each profiled district highly recommend contracting a vendor to facilitate the strategic planning process. Administrators at District D, District A, and District E contracted vendors to support their most recent strategic planning process. Contacts at District C and District B contracted vendors to support previous strategic planning cycles. Now, senior administrators at these districts have enough expertise in strategic planning that they facilitate the process themselves. Contacts report that districts engaging in their first strategic planning cycle should hire a vendor for the following reasons:

- **Experience.** Experience facilitating strategic planning process proves critical to strategic planning success.
- **Timeline.** Vendors keep strategic planning process on desired timeline.
- **Objectivity.** Vendors bring objectivity and candor to planning process. They can readily hold candid conversations with staff and community members about sensitive subjects.

To hire a strategic planning vendor, administrators at **District E** put out a request for proposal (RFP). The district received around 15 RFPs. They chose their vendor based on two criteria: (1) demonstrated strategic planning experience and (2) commitment to community engagement.

Strategic planning vendors cost around \$100,000 to facilitate the strategic planning process from start to finish. At profiled districts, vendors completed the following services:

- Designed district strategic planning processes
- Scheduled and led steering committee meetings
- Facilitated focus group sessions and stakeholder interviews
- Conducted classroom walkthroughs
- Analyzed district data
- Wrote first draft of strategic plan

- Iterated on strategic plan content with steering committee

Initial Goals

Research Education Trends and District Status to Identify Potential Goal Areas

Before engaging the community, steering committees should identify potential goal areas so that steering committees can ask for feedback and direction from the community on specific topics. Steering committees at both District C and District D completed exercises to identify potential goal areas.

At District C, the steering committee researched trends and issues in K-12 education. To complete this exercise, the committee did the following.

- **Divide.** Administrators split the steering committee into four groups. Administrators assigned each group one of four levels: local, state, national, or global.
- **Research.** Administrators tasked each group to research the “trends and issues” at their level for the next several years. Groups conducted this research between committee meetings as a ‘homework’ assignment.
- **Debrief.** At the following steering committee meeting, groups presented their findings to the committee at large. The committee discussed and debriefed the future of K-12 education.

Similarly, the steering committee/vendor at District D and District E completed exercises to identify potential areas for strategic goals. Prior to any steering committee meetings, the committee at District D read an analysis of their district’s data. The analysis included sections on enrollment, demographics, and academic achievement. Committee members would read a section and then engage in an online discussion through an online discussion board. Through this exercise, the committee identified six areas to focus on while soliciting input from community stakeholders: finance; governance; school improvement; instructional delivery; college, career, and life readiness; and community voice. At District E, the strategic planning vendor analyzed district data and conducted classroom walkthroughs to better understand the district’s current position in respect to potential strategic goals. For example, the vendor examined data on the proportion of Black students in honors classes compared to district demographics, which helped highlight equity as a potential goal area.

In addition to sending out a digital survey, administrators at District C printed out physical copies of the survey. They distributed physical copies to local public buildings (e.g., library, government buildings) and collected them after approximately one month.


Survey District Community to Identify District-Wide Priorities

To understand the most pressing issues to the community, administrators at District C surveyed their district on the community’s top priorities for the district over the next several years. The steering committee sent out a six-question survey via Google Forms to the entire district community and district staff (see **Appendix A** for the survey). The survey included four multiple-choice questions and two open-ended questions. The steering committee used the insights gleaned during their initial research to identify 14-18 answer options to the four multiple-choice questions. The committee collected 1,176 survey responses total.

While only District C surveyed their district specifically for their strategic plan, all profiled districts informed their strategic plan to some extent through their regular survey routines. Steering committees use awareness gained regular normal surveys (e.g., climate surveys, staff surveys) to inform their decisions in steering committee meetings. See several profiled districts’ survey platforms and costs below.

Survey Platforms at Profiled Districts

| District | Platform and Cost |
|------------|--|
| District B | Thoughtexchange : \$36,000 per year SurveyMonkey : See here for pricing information |
| District C | Google Forms : Free |
| District D | K-12 Insights : \$10,000-\$12,000 per year |



Consider Holding Focus Groups to Identify Goal Areas

To help determine goal areas at the start of District A’s nine-month planning process, the committee conducted a series of focus groups with parents and district staff. The vendor facilitated these sessions with open-ended questions such as “what do you want to see out of [District A] as an organization?”

3) Develop Strategic Plan

Community-Informed Goal Iteration


Use Community Forums, Focus Groups, and/or Interviews to Research Stakeholder Perspective and Priorities

After identifying around four to six strategic goal areas, all profiled districts researched their community's perspectives and priorities to determine exactly what the goals should say and how to accomplish them. To do this, profiled districts used one or more engagement method (e.g., focus group) to solicit input from district stakeholder groups. In general, districts attempted to solicit input from both internal (e.g., teachers) and external stakeholders (e.g., parents). Further, administrators attempted to solicit input from each community group within the district.

To solicit stakeholder input, profiled districts issued a general call for volunteers to serve in a focus group or take part in a community forum. For the most part, administrators sent district-wide emails calling for general attendance.

Strategic Planning Community Engagement Overview

How Profiled Districts Reached Stakeholders to Solicit Input on Strategic Goals

| Engagement Event | | Recruitment Method |
|--|---|--|
|  | Community Forum <ul style="list-style-type: none">• District B• District C | At District B, administrators invited the entire district to a community forum via district-wide email. Administrators conducted targeted phone outreach inviting members of the Hispanic community to the forum to ensure representative participation at the event. |
| | Focus Groups <ul style="list-style-type: none">• District D• District B• District E• District A | Administrators issued a general call for focus group attendance. They invited anyone in the district to participate. In addition, to ensure representative participation at these focus groups, administrators conducted intentional outreach to community segments that would not otherwise participate in the focus groups. At District E, administrator personally invited families the administration knew felt unhappy with the district. |
| | Interviews <ul style="list-style-type: none">• District A• District D | Steering committees and vendors targeted high-level administrators and officials for one-on-one interviews. At District D, the vendor interviewed school leaders, division leaders, and city officials, including the mayor. |

Conduct Targeted Outreach to Community Groups to Ensure Representative Participation

To ensure representative participation at these events, profiled districts conducted targeted outreach towards community groups that would otherwise underrepresent themselves in focus groups or community forums. Contacts at District B note that personalized phone outreach effectively draws community members to their forum who otherwise would not attend.

At Smaller Districts, Hold Community Forum to Solicit Feedback on District Priorities

The smaller profiled districts, District B (~3,500 students) and District C (~5,500 students), relied primarily on community forums to solicit stakeholder input. Administrators use these sessions to gather information on community members' top priorities within identified goal areas (identified through surveys, research on education trends, and/or district data analysis). This allows administrators to refine goal areas into goals and determine how to operationalize strategic goals.

Normally, District B holds their community forum on a weekend morning. See below for how administrators at District B facilitate their community forum.

Community Forum Process at District B



First, administrators gather the community into a large room (e.g., gymnasium, cafeteria) and serve breakfast.



Administrators explain how the day will work. Then, administrators deliver a district overview which includes (1) the recent past of the district (e.g., recent accomplishments), (2) the status of the district, and (3) ideas for the future of the district.



The community breaks out into one of four breakout rooms. Each breakout room corresponds to a goal area at District B.



In each breakout room, an administrator who works closely with the content of the goal area (e.g., chief academic officer may present the academic achievement goal area) delivers a five to 10 minute overview of the district's efforts relative to the goal. The overview includes (1) the recent history of the district relative to the goal, (2) recent accomplishments related to the goal, and (3) ideas for future initiatives related to the goal.



Then, the responsible administrator opens the room up to discussion. Community members discuss for around 45 minutes to 1 hour in the room. A notetaker from the district takes careful notes on each comment.



Community members rotate to another breakout room of their choice. The responsible administrator delivers the same overview and opens it up to discussion.



After community members have discussed in two breakout rooms, administrators bring the entire group back together. Administrators thank the participants and describe how they will use the information gathered moving forward.

After the community forum, district staff write up each comment aired during the community forum and email it to the participants so that participants know the district registered their feedback. Contacts note that themes emerge during community forums—community priorities come into focus. Steering committees use

this information to refine goal areas into goals and develop objectives, which determine how the district will achieve their goals.

At Larger Districts, Hold Focus Groups to Solicit Feedback on District Priorities

Profiled districts experienced no unexpected changes to their strategic planning processes—with one exception. Senior leaders at District E pushed their vendor to hold more focus groups than originally planned to ensure (1) representative participation from all stakeholder groups and (2) that everyone felt that their voice had been heard.

The larger profiled districts, District D (~16,000 students), District A (~11,000 students), and District E (~5,000 students), relied primarily on focus groups rather than community forums to solicit stakeholder input. Strategic planning vendors contracted by these districts facilitated each focus group session. At District D, the vendor facilitated sessions in languages representative of the demographics of the district: English, Spanish, and Arabic.

Focus Group Practices at Profiled Districts



Number of groups

- At District E, administrators and the district's vendor held a series of **six to 10** focus groups.
- At District D, administrators and the district's vendor held **15** focus groups total.



Participants

- At District E, administrators convened a focus group for parents at each school level (i.e., elementary, middle, and high). While the district targeted invites towards parents at a specific school level, they allowed any parent to come because scheduling constraints may prevent parents from attending the session geared towards them. Administrators convened internal sessions for teachers, staff, and building administrators. They also held a session for students in grades six through 12.
- At District D, the focus groups heard from a total of 105 participants, including 38 secondary students.

Interview High-level Stakeholders One-On-One



In addition to focus groups, vendors at District D and District A interviewed stakeholders one-on-one to further solicit feedback on goal areas and potential directions for the district. At District D, the vendor interviewed school leaders, division leaders, and city officials, including the mayor.

Plan Composition

Assess and Revise District Mission, Vision, and Core Values to Ensure Strategy Aligns with District Principles

Each profiled district begins their strategic plan with statements that outline their district's mission, vision, and core values. At District D and District B, the school board manages the review of the mission, vision, and values. Contacts at District D

report that while the school board manages the revision of the mission, vision, and values, they go through a process of checks with district administrators.

At District A, the steering committee assessed and revised the district's mission, vision, and values. To do so, the steering committee completed vendor-guided brainstorming and discussion sessions that addressed foundational questions such as "what makes [District A] unique?" and "why do you like working at [District A]?" and "what is the best part of your job?"

Contacts at District A advise administrators to incorporate unique and fun aspects of the district into strategic plans to avoid producing a bland, corporate strategic plan. For example, the steering committee included 'joy' as one their core values at District A.

Develop and Refine Four to Five Goals to Guide Overall District Strategy

Steering committees should use information gathered from their community engagement initiatives (e.g., focus groups) and other research (e.g., data analysis) to distill district aims into four to five strategic goals. Contacts note that steering committees develop goals through an iterative process during the community engagement phase. As noted in the community engagement section, steering committees should refine potential goals through feedback from the community.

Strategic goals should describe broad district intentions. For example, a strategic goal at District B reads, "increase the academic achievement of all students."² Each goal should have adequate room to develop supporting objectives, tasks, and metrics within it.

At District C, the steering committee translated some of their survey feedback directly into strategic goals. For example, administrators translated the most popular answer to question two of their survey (see **Appendix A**) directly into one of their strategic goals. Question two reads, "what are the greatest challenges and issues **District C** has to address over the next six years in order to provide an excellent education to our students?" The most popular answer to that question reads, "maintain safe and secure district schools and facilities." As a result, the steering committee created a goal on school safety.

Develop Objectives, Tasks, and Metrics to Support Each Goal

Once the steering committee establishes strategic goals, the committee can develop objectives, tasks, and metrics that serve to describe how districts will both operationalize and measure their efforts. At most profiled districts, the vendor writes the first draft of the strategic plan and then iterates and revises the plan with the steering committee. Vendors and steering committees develop plans from the top (goals) downwards through tasks and metrics. See below for a framework that outlines a common strategic plan structure. While this plan structure does not correspond to any research-backed framework, each profiled district and vendor employed this strategic planning framework.

2) "[District B Strategic Plan 2015-2020]," *District B*, accessed November 23, 2020.

Strategic Plan Framework

Examples adapted from District D's Strategic Plan³

This framework excludes introductory portions of the plan, such as the mission vision and values.



Description

Strategic goals identify the aims of the district. They identify areas on which to focus time and resources.

Example

Academic excellence: students will engage with high-quality instruction



Objectives define how a district will operationalize their goal. Each goal can have between two to eight supporting objectives.

Execute a high-impact approach to reading instruction in grades K-2 across the district



Metrics describe how the district will evaluate its progress on objectives and goals.

Proportion of K-2 classes across district employing high-impact strategies as measured by a rubric



Tasks outline specific actions the district will take to achieve an objective. Each objective may have between four to 10 supporting tasks.

Convene a K-2 reading committee with members from all schools dedicated to identifying and implementing reading best practices.

To ensure administrators accomplish each task at District B, administrators establish a timeline for each task.

Upgrade Tasks Each Year to Continually Drive Impact Through Strategic Plan

To continually drive impact through the strategic plan, the superintendent's cabinet at District B (which serves as the strategic planning steering committee at this district) upgrades their plan's tasks each year. At District B, administrators complete each task outlined within the strategic plan by its allotted timeline, which is normally within a year. If administrators cannot complete their goals by the allotted timeline, they can adjust the timeline. Once administrators complete their tasks, the superintendent's cabinet determines new tasks that further support their goals and objectives. This ensures that the district's efforts remain focused through the strategic plan's goals and objectives and ensures the district "lives" the plan.



3) "[District D Strategic Plan 2020-2025]," *District D*, accessed November 23, 2020.

4) Monitor Progress

Accountability and Tracking

Assign a Goal Manager to Each Goal to Ensure Plan Ownership

Strategic plans live and die by implementation. Strategic plans all too often become shelf documents that fail to drive impact. To ensure strategic plans drive impact, administrators should promote plan ownership. At District A and District B, the steering committee assigns each goal to a senior district administrator. This senior administrator, referred to as the goal manager, must achieve the strategic goal's objectives and tasks, as measured by the goal's metrics.

Incorporate Strategic Plan into Staff Meetings Regularly to Promote Plan Presence in Everyday Operations

At District B and District C, two districts with histories of driving impact through their strategic plan, senior district administrators (the superintendent and the assistant superintendent for secondary education, respectively) spoke about living and breathing their strategic plan. Each spoke about how the strategic plan permeates their district.

To encourage district staff to keep the strategic plan top-of-mind, administrators at District C incorporate it into each staff meeting. Specifically, administrators explicitly tie each meeting's agenda item to the strategic plan. Further, administrators print a graphic that represents the strategic plan in the upper left-hand corner of each staff meeting agenda.

Consider Distilling Plan into Graphic and Distribute Posters

In addition to incorporating the strategic plan into each staff meeting, administrators at District C encapsulated the broad strokes of their strategic plan into an easy-to-digest graphic. They distributed copies of the graphic to each classroom and office in the district.

Regularly Present Plan Progress to School Board to Ensure Plan Accountability

To keep administrators accountable to achieving aims outlined in the strategic plan, administrators at District B, District C, and District D regularly present strategic plan progress to their school board. At District C, administrators present plan progress quarterly. Each quarter, administrators focus their board presentation on one of their four strategic goals. Administrators present on each goal once per year. At District B, goal managers present their work on each task once they have completed the task.

Keep a Tracker Online to Ensure District Leadership Awareness of Task Progress

At District B, the superintendent keeps a tracker that outlines which tasks have been completed and which ones have yet to be completed. See below for an adapted version of the tracker. Note that the tracker below only represents an excerpt of a tracker.

Strategic Plan Tracker

Adapted from District B's Strategic Plan.⁴

G/O/T refers to goal/objective/task. So, this task supports goal 1 and objective 1A. It is the third task under objective 1A.

| G/O/T | Task | Timeline | Comp. | Goal manager |
|-------|--|----------------|-------|-------------------------------------|
| 1/A/3 | Research early childhood education best practices | March 15, 2020 | X | Director of teaching and learning |
| 3/B/4 | Develop and implement bond marketing campaign. | April 15, 2020 | X | Director of Communications |
| 2/C/6 | Educate parents about district emergency plans in collaboration with the parent-teacher association. | July 15, 2020 | | Director of Business and Operations |

A strategic plan tracker allows senior leadership to stay abreast of district progress on strategic plan tasks. To provide transparency to the community, administrators publish the document at the end of the district's strategic plan.

Consider Developing Dashboards to Communicate Plan Progress to Community

Administrators at District A plan to create district dashboards that communicate strategic plan progress to the community.

However, administrators at District C created dashboards to communicate plan progress for their previous strategic planning cycle and administrators found that very few community members looked at the dashboards.

So, districts that build dashboards to communicate plan progress should also institute a practice that promotes the dashboards, such as a regular email to the district community that emphasizes the dashboards' importance.

4) "[District B] Strategic Plan," *District B*.

5) Research Methodology

Project Challenges

Leadership at a partner district approached the Forum with the following questions:

- Which internal and external stakeholders participated in the strategic planning process at contact districts?
- How did administrators at contact districts identify and recruit these stakeholders (e.g., through the district student information system (SIS), existing partnerships with business leaders, etc.)?
- How did administrators at contact districts solicit input from these stakeholders?
 - How did administrators at contact districts use tech solutions/tools or third-party entities to solicit input from stakeholders?
 - What were the costs associated with those designated solutions/tools or third-party entities?
- Did administrators at contact districts use any other third-party entities to complete the strategic planning process? If so:
 - What third-party entities did administrators at contact districts use?
 - What specific services did these third-party entities perform at contact districts?
 - What, if any, research-informed framework did these third-party entities use at contact districts?
 - Do administrators at contact districts believe these third-party entities incorporated local context into their framework/approach?
 - What were the costs associated with these third-party entities?
- In many districts, the academic department may tend to dominate the strategic planning process. How did administrators at contact districts ensure that stakeholders from other district units—beyond academics—participated equally in the strategic planning process?
- Did administrators at contact districts have to make any unexpected changes to their strategic planning process during the execution of the process? If so, what were the changes?
- How did administrators at contact districts incorporate progress monitoring and accountability into their strategic plan?

Project Sources

The Forum consulted the following sources for this report:

- EAB's internal and online research libraries (eab.com)
- National Center for Education Statistics (NCES). <http://nces.ed.gov/>.
- "Board Brief: Strategic Plan Update." *District D*. November 22, 2019.
- "[District D] Strategic Plan 2020-2025." *District D*. Accessed November 23, 2020.
- "[District B] Strategic Plan 2015-2020." *District B*. Accessed November 23, 2020.
- "Strategic Plan," *District C*. Accessed November 23, 2020.

Research Parameters

The Forum interviewed district administrators at districts with robust strategic plans.

A Guide to Institutions Profiled in this Brief

| Institution | Region | Approximate Enrollment |
|-------------|-------------------|------------------------|
| District D | Mid Atlantic | 16,00 |
| District C | Mid Atlantic | 5,500 |
| District E | Midwest | 5,000 |
| District B | Pacific Northwest | 3,500 |
| District A | Midwest | 11,000 |

7) Appendix A

See below for an adapted version of the survey that the steering committee at District C used to identify district priorities. Administrators sent this survey through Google Forms.

Constituent-Driven Strategic Plan Survey

The [District C] Board of Education has initiated a Constituent-Driven Strategic Planning process. A key component of this process is to receive input from a survey from students, parents, staff, and community members that will be used to set District priorities for the next six years.

The survey is short, taking about five minutes of your time. The survey asks for basic demographic information and then presents four multiple choice questions and two open-ended questions regarding priorities you believe to be important for the District to consider. The list of responses to each of these questions were developed by a Steering Committee made up of a cross-section of community members.

Thank you for your participation in this most important process. Your answers to this survey will be reviewed by Strategic Plan Steering Committee members, District administrators, and Board members. Please complete this survey by July 1, 2018

* Required

1. Demographic Information*

Check all that apply

- ☐ Current student
- ☐ District employee
- ☐ Former student
- ☐ Parent with a child who has not reached school age
- ☐ Parent with an elementary student in the district
- ☐ Parent with a secondary student in the district
- ☐ Parent with a student previously in the district
- ☐ Parent with a school aged student **not** attending the District
- ☐ Resident/homeowner
- ☐ Resident/renter
- ☐ Retiree

2. What are the greatest challenges and issues District C has to address over the next six (6) years in order to provide an excellent education to our students? *

Check all that apply

- ☐ Maintaining safe and secure District schools and facilities.
- ☐ Developing curriculum to respond to individual student learning needs.
- ☐ Hiring and retaining quality teachers, administrators, and support personnel in an increasingly competitive market.
- ☐ Meeting the increasing mental, physical, and emotional health needs of students.
- ☐ Maintaining a balance between academic, athletics, and the arts to develop the whole child.
- ☐ Maintaining current breadth of curricular programs under economic and funding constraints.
- ☐ Advancing our competitive edge with technology usage.
- ☐ Enhancing community engagement within our schools.
- ☐ Ensuring the global competitiveness of our students.
- ☐ Preparing students to work in a multi-cultural world.
- ☐ Hiring a diverse workforce.
- ☐ Preparing teachers to educate a more diverse student population.
- ☐ Providing students with authentic learning experiences.
- ☐ Maintaining current breadth of extracurricular programs under economic and funding constraints.
- ☐ Other: _____

3. What are the most important skills and abilities students need to know or be able to do? *

Check all that apply

- ☐ Collaborate and work productively with others
- ☐ Communicate using writing, speaking, and listening skills
- ☐ Be creative and critical thinkers
- ☐ Mastery of core academic content areas (math, science, reading/English, social studies).
- ☐ Be an aware and responsible global citizen
- ☐ Be conversant in a world language
- ☐ Develop occupational skills through vocational training
- ☐ Demonstrate compassion and empathy towards others

- ☐ Be a digitally literate and productive citizen
- ☐ Be a responsible consumer by understanding financial issues
- ☐ Organize, prioritize, set goals, and manage time
- ☐ Understand life stressors and maintain a healthy, balanced, and well-rounded lifestyle
- ☐ Demonstrate grit and resilience
- ☐ Appreciate the arts
- ☐ Engage in civic life
- ☐ Able to adapt to change and be flexible
- ☐ Be self-aware and mindful

4. What evidence do you use to judge the quality of education in District C? *

Check all that apply

- ☐ The quantity and quality of curricular programs to meet the needs of students
- ☐ The number of highly qualified staff
- ☐ Admission rate at top tier colleges/universities
- ☐ Student achievement on standardized assessments
- ☐ Comparison of program and results to state, national, and international data sets
- ☐ The quantity and quality of extracurricular programs to meet the needs of students
- ☐ High levels of parent and community engagement/involvement
- ☐ Positive relationships between students and staff
- ☐ A positive, safe and welcoming school climate
- ☐ Graduation rates
- ☐ School attendance rates
- ☐ Survey of graduates for college/career readiness
- ☐ Student to teacher ratios
- ☐ Diversity of faculty and staff
- ☐ Health and wellness of students and staff
- ☐ Student engagement in the Arts
- ☐ Real estate factors (homes values/sales)

5. What should the financial priorities be for District C during the next six (6) years? *

Check all that apply

- ☐ Maintain high quality, diverse, professional staff
- ☐ Maintain appropriate student to teacher ratios
- ☐ Maintain clean, well repaired, environmentally sustainable, and safe/secure facilities
- ☐ Additional investments in school safety and security elements
- ☐ Continue to support neighborhood schools
- ☐ Provide training and development opportunities to keep staff skilled and competent
- ☐ Invest in strategies to promote Social and Emotional Learning for students and staff
- ☐ Maintain and improve current instructional programs
- ☐ Strengthen partnership with Career and Vocational Technical Center
- ☐ Maintain up-to-date technology
- ☐ Continued allocation of funding for arts, athletics, and extracurricular offerings
- ☐ Invest in additional mental health resources for students
- ☐ Remain competitive in attracting substitute teachers
- ☐ Seek alternative revenue sources
- ☐ Explore increased partnerships with the Municipality
- ☐ Provide support to attract/retain high quality administrators

6. What could the [District C] do that would delight you?

7. What information or advice would you give the strategic planning team as they make decisions about long-term priorities and goals for the District C?
