

STRATEGIC PLANNING PROCESS

MADEIRA SCHOOL BOARD PLANNING COMMISSION STUDY 2016-2017

Presented to Board of Education for Madeira City Schools by:

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Madeira Resource: Superintendent Kenji Matsudo

Objective:

The district does not have a formal “strategic plan.” Our subcommittee was tasked with conducting research which will enable the Board and district to assist in determining whether Madeira City Schools should undergo creating and implementing a strategic plan. With that goal in mind we strived to gather information relating to three key questions as it relates to strategic planning:

- 1) What are “best practices” approaches to strategic planning in a school district?
- 2) If a plan is to be created, how can we work together to ensure it is a lasting plan for the district?
- 3) What are the key components of a school district’s successful strategic plan?

Methodology:

We created a list of 14 interview questions and then reached out to 20 schools to inquire about their use of a district-wide strategic plan. Schools were chosen because of their excellent reputations in academics, administration, or both. Fourteen of the 20 schools responded. We also interviewed three consultants who conduct strategic planning.

Findings:

Full results of our interviews with responding districts are appended. Common themes were easily identified during the interview process:

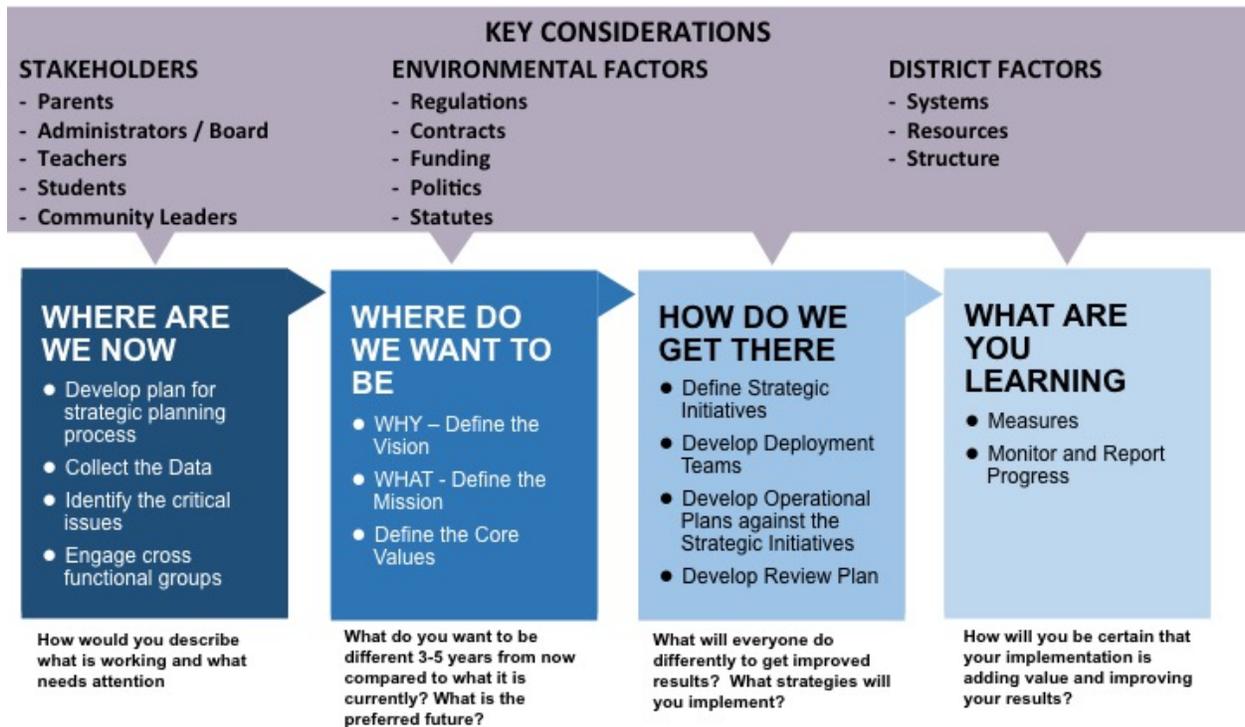
- Most (11 of 14 respondents) have a formal strategic plan, and a majority (7 of the 11 with a strategic plan) used a paid, outside consultant to create the plan.
- Districts report that having cross-representation from a variety of key stakeholders is critical to “buy-in” for any strategic plan. Engaging the community and getting everyone on the “same page” creates community members who will be invested in the plan (and more closely invested in the school district).
- Two characteristics that districts indicate were critical to the success of their plans was the fact that they were *actionable* and *flexible*.
- After creation, specific measures should be taken to ensure that the plan is regularly consulted and used. Most districts task one or two individuals with this responsibility.

- Annual or regular review/updating is recommended.

Recommendations:

- We specifically recommend that Madeira undergo a process to create and implement a strategic plan.
- We recommend hiring a consultant to facilitate that process, and anticipate that the consultant will have recommendations with respect to timing and methodology of the process. Hamilton County Educational Service Center may be a valuable resource.

(an appendix containing the details associated with the research, interviews, and other information compiled in creating this report was provided during its physical presentation)



Strategic Plan Example:

<http://www.westminster.net/strategic-plan/index.html>

APPENDIX

I. RESEARCH

A. Questions asked of comparator districts:

1.	Do you have a formal strategic plan?
2.	Who was involved in creating your strategic plan?
3.	Did you use a consultant? If (YES) who did you use and what was cost?
4.	How did you engage all stakeholders (or representatives) in the process?
5.	How did the school develop, review, and evaluate the strategic plan?
6..	Based on your experience, what was the MOST successful aspect of the strategic planning process?
7.	What timeframe does your strategic plan cover?
8.	Who manages the ongoing strategic plan?
9.	How does the strategic plan trickle down into all areas of planning for your school?
10.	If you don't have a strategic plan - how do you structure planning?

B. Questions asked of known consultants:

1.	What are some names/examples of recent schools you have helped in Strategic Planning?
2.	What does your SP process look like (approach, timeline, cost)?
3.	Who should be involved (from Madeira schools) in this process?
4.	What are the benefits) of using a consultant verses in-house?

C. Districts and consultants contacted for study:

<u>School</u>	<u>Team Member</u>	<u>Contact</u>	<u>Formal Strategic Plan</u>
Wyoming	Dave	Yes	Yes
Indian Hill	Dave	Yes	No
Mariemont	Dave	Yes	Yes, essentially
Sycamore	Dave	Yes	Yes
Deer Park	Jim	Yes	No
Forest Hills	Jim	Yes	Yes
Mason	Jim	Yes	Yes
Loveland	Jim	Yes	No
Kings	Steve B	Yes	No, but in process
Milford	Steve B	Yes	Yes
Oakwood	Steve B	No response	
Solon	Steve B	Yes	Yes
Mayfield	Steve P	Yes	Yes
Upper Arlington	Steve P	Yes	Yes
Hilliard	Steve P	No response	
Ottawa Hills	Steve P	No response	
Ft. Thomas Ind	Lindsey	No response	
St. Xavier	Lindsey	No response	
Ursuline	Lindsey	Yes	Yes
Hawken	Lindsey	No response	

<u>Consultant</u>	<u>Team Member</u>	<u>Contact</u>
Pathway Guidance	Amanda	Yes
Jim Yunker/Yunker Group	Dave	Yes
Bill Sears (Hamilton Educational Service Center)	Amanda	Yes

II. INTERVIEW RESULTS

A. Interviews: Schools

<u>School Name:</u>	<u>Contact Name:</u>	<u>Assigned to:</u>
Deer Park	<u>Jeff Langdon</u>	<u>Jim</u>

1.	Do you have a formal strategic plan?	At Deer Park we don't actually have a strategic plan, but it is something we are considering. We have yearly goals that are established by the BOE, Admin Team and Teachers. We used an organization called LEI to help us set our goals.
2.	Who was involved in creating your strategic plan?	
3.	Did you use a consultant? If (YES) who did you use and what was cost?	
4.	How did you engage all stakeholders (or representatives) in the process?	
5.	How did the school develop, review, and evaluate the strategic plan?	
6..	Based on your experience, what was the MOST successful aspect of the strategic planning process?	
7.	What timeframe does your strategic plan cover?	
8.	Who manages the ongoing strategic plan?	
9.	How does the strategic plan trickle down into all areas of planning for your school?	
10.	If you don't have a strategic plan - how do you structure planning?	

<u>School Name:</u>	<u>Contact Name:</u>	<u>Assigned to:</u>
Forest Hills	<u>Scot Prebles</u>	<u>Jim</u>

1.	Do you have a formal strategic plan?	Yes
2.	Who was involved in creating your strategic plan?	Students, staff, parents, administrators, community members and board members
3.	Did you use a consultant? If (YES) who did you use and what was cost?	No
4.	How did you engage all stakeholders (or representatives) in the process?	Focus groups, staff meetings, surveys, strategic vision committee
5.	How did the school develop, review, and evaluate the strategic plan?	Started with administrator collective commitment design from which I created themes and goal statements. From there we continued to refine values, beliefs, goals, objectives, action plans. We then used a strategic vision committee made up of ten representatives that represent the entire district to refine all aspects into a proposal for Board Members, inclusive of recommendations for implementation.
6..	Based on your experience, what was the MOST successful aspect of the strategic planning process?	120 people in one room facilitated by one person. Massive amount of information was retrieved through the use of an appreciate inquiry process.
7.	What timeframe does your strategic plan cover?	5 years
8.	Who manages the ongoing strategic plan?	superintendent, cabinet and then building and department level continuous improvement plans which are aligned to the plan
9.	How does the strategic plan trickle down into all areas of planning for your school?	CIP building leadership teams
10.	If you don't have a strategic plan - how do you structure planning?	

School Name:	Contact Name:	Assigned to:
Mason	<u>Dr. Gail KistKline</u>	<u>Jim</u>

1.	Do you have a formal strategic plan?	Yes.
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2.	Who was involved in creating your strategic plan?	We had community members, business leaders, administrators and teachers.
3.	Did you use a consultant? If (YES) who did you use and what was cost?	Rick Gregory, creative thinking facilitator, P&G Gym.
4.	How did you engage all stakeholders (or representatives) in the process?	Rick Gregory brought in a different approach by using wall size charts, music, hula hoops, visual charts to help us create a plan.
5.	How did the school develop, review, and evaluate the strategic plan?	<p>We first looked back at the history of Mason and mapped what brought us to where we were then using this visual mapping process. We then spent time looking at what was possible for students in Mason and developed 4 Bold Steps. These 4 Bold Steps were the anchors for our Annual Goals and Priorities and we had community members, business leaders, administrators and teachers working on these 4 committees to create action items (goals and priorities) for each one. We had so much fun creating this plan and it has really come to life in our district.</p> <p>We have since condensed the Bold Steps to 3 areas and develop our goals/priorities and metrics each year around these 3 anchor areas (which are the core of our Mission Statement). We no longer need a facilitator We wanted a vision that everyone could articulate and live each day: Growing Greatness Together. We chose each of those three words very purposely and they exemplify what we strive for in Mason. Growing - we are a learning, growing organization and strive to get better each day. Greatness - we are not resting on our laurels and strive for greatness and excellence in everything we do, continually looking for innovative approaches that will provide our students opportunities beyond all other places. Together - we are in the people business and we work together to accomplish all of this with our families, community, students and staff. "If you want to go fast, go alone. If you want to go far, go together" We want</p>

		<p>to go far! Wrapped in these three words are our values: Collaboration, Learning, Diversity, Innovation, Integrity, Excellence, Service. and we do this work together each year and just recently revised our vision. We wanted a vision that everyone could articulate and live each day: Growing Greatness Together. We chose each of those three words very purposely and they exemplify what we strive for in Mason. Growing - we are a learning, growing organization and strive to get better each day. Greatness - we are not resting on our laurels and strive for greatness and excellence in everything we do, continually looking for innovative approaches that will provide our students opportunities beyond all other places. Together - we are in the people business and we work together to accomplish all of this with our families, community, students and staff. "If you want to go fast, go alone. If you want to go far, go together" We want to go far! Wrapped in these three words are our values: Collaboration, Learning, Diversity, Innovation, Integrity, Excellence, Service.</p>
6..	Based on your experience, what was the MOST successful aspect of the strategic planning process?	The most successful part of the process is seeing everyone invested in Growing Greatness Together!
7.	What timeframe does your strategic plan cover?	We develop our district goals and priorities annually. We revisit the plan each year and determine if we are on the right track and make adjustments.
8.	Who manages the ongoing strategic plan?	Because we don't have the traditional strategic plan, we don't have a single person managing it. Many individuals are responsible for various aspects of our work. Our public information officer usually puts most of the information together for us, but it is a shared document so many people contribute to that as well.
9.	How does the strategic plan trickle down into all areas of planning for your school?	We develop our district goals and priorities annually and then each Building, Administrator, Dept, and teachers develop

		their priorities based on the district ones. More importantly, the plan, the goals and vision are part of our daily work.
10.	If you don't have a strategic plan - how do you structure planning?	

<u>School Name:</u>	<u>Contact Name:</u>	<u>Assigned to:</u>
Loveland	<u>Chad Hilliker</u>	<u>Jim</u>

1.	Do you have a formal strategic plan?	We have not had a formal strategic plan developed recently. We are considering doing one with a consultant this year.
2.	Who was involved in creating your strategic plan?	
3.	Did you use a consultant? If (YES) who did you use and what was cost?	
4.	How did you engage all stakeholders (or representatives) in the process?	
5.	How did the school develop, review, and evaluate the strategic plan?	
6..	Based on your experience, what was the MOST successful aspect of the strategic planning process?	
7.	What timeframe does your strategic plan cover?	
8.	Who manages the ongoing strategic plan?	
9.	How does the strategic plan trickle down into all areas of planning for your school?	
10.	If you don't have a strategic plan - how do you structure planning?	

<u>School Name:</u>	<u>Contact Name:</u>	<u>Assigned to:</u>
Wyoming	Sue Lang, Superintendent	Dave

1.	Do you have a formal strategic plan?	Yes
2.	Who was involved in creating your strategic plan?	Superintendent conducted a series of numerous community meetings (about 24 “listening sessions”) involving community members including parents, non-parents, everybody. These meetings formed the foundation of the plan drafted by the superintendent’s office (largely).
3.	Did you use a consultant? If (YES) who did you use and what was cost?	No.
4.	How did you engage all stakeholders (or representatives) in the process?	The “listening sessions” focused on getting input on three key issues: district strengths, areas of desired focus, and asking the question “what can the superintendent do”? These sessions were used as a foundation of the plan. The sessions were community wide, so everyone had input in the process.
5.	How did the school develop, review, and evaluate the strategic plan?	After the plan was written, it has since been in constant use, with annual modifications, often after annual retreat among board, administration, staff, and the district’s educational association.
6..	Based on your experience, what was the MOST successful aspect of the strategic planning process?	The fact that it is constantly used is an important strength. The listening sessions themselves are a good tool to improve community relations and will help ensure levy-voter’s needs are met, too.
7.	What timeframe does your strategic plan cover?	Not specified - took place 6 years ago with annual revisions. Could look to do again soon.
8.	Who manages the ongoing strategic plan?	Superintendent.
9.	How does the strategic plan trickle down into all areas of planning for your school?	It also helps formulate specific data/learning metrics for each building.
10.	If you don’t have a strategic plan - how do you structure planning?	N/A

<u>School Name:</u>	<u>Contact Name:</u>	<u>Assigned to:</u>
Indian Hill	<u>Mark Miles,</u> <u>Superintendent</u>	Dave

1.	Do you have a formal strategic plan?	No
2.	Who was involved in creating your strategic plan?	
3.	Did you use a consultant? If (YES) who did you use and what was cost?	
4.	How did you engage all stakeholders (or representatives) in the process?	
5.	How did the school develop, review, and evaluate the strategic plan?	
6..	Based on your experience, what was the MOST successful aspect of the strategic planning process?	
7.	What timeframe does your strategic plan cover?	
8.	Who manages the ongoing strategic plan?	
9.	How does the strategic plan trickle down into all areas of planning for your school?	
10.	If you don't have a strategic plan - how do you structure planning?	<p>Indian Hill is looking into the possibility of exploring creating a strategic plan or conducting a strategic planning process. Currently, it utilizes an "informal" plan. Annually, principals, with teacher-leaders, develop an annual goal or informal plan with respect to specific (usually academic) goals in mind.</p> <p>The District also has a physical plant plan for upkeep/maintenance, etc.</p>

<u>School Name:</u>	<u>Contact Name:</u>	<u>Assigned to:</u>
Sycamore	<u>Karen Naber</u>	Dave

1.	Do you have a formal strategic plan?	Yes
2.	Who was involved in creating your strategic plan?	Administration, board, staff, even parents and students, with the group growing intentionally during process
3.	Did you use a consultant? If (YES) who did you use and what was cost?	Yes, it was Mike Stabile at http://www.futurenowed.com/about.html Can't remember cost, but was reasonable.
4.	How did you engage all stakeholders (or representatives) in the process?	Used a small group to start, then spread out the reach of those involved
5.	How did the school develop, review, and evaluate the strategic plan?	Annual retreat with board; plan is reviewed purposefully
6..	Based on your experience, what was the MOST successful aspect of the strategic planning process?	1) Flexibility to tweak. Things move quickly and you need a plan which is capable of adjusting when required. 2) Ensuring that stakeholders are properly heard
7.	What timeframe does your strategic plan cover?	5 years, but it has been longer. However, remains viable because it receives annual attention and adjustments.
8.	Who manages the ongoing strategic plan?	Karen Naber (Ass't Superintendent)
9.	How does the strategic plan trickle down into all areas of planning for your school?	It impacts every aspect, from curriculum to physical plant issues.
10.	If you don't have a strategic plan - how do you structure planning?	n/a

School Name:	Contact Name:	Assigned to:
Mariemont	Shannon Kromer	Dave

1.	Do you have a formal strategic plan?	We have a District Action Plan which is typically revised annually
2.	Who was involved in creating your	Administration

	strategic plan?	
3.	Did you use a consultant? If (YES) who did you use and what was cost?	Not with annual reworking of plan
4.	How did you engage all stakeholders (or representatives) in the process?	Plan is developed by the superintendent in collaboration with the administration team and the board of education
5.	How did the school develop, review, and evaluate the strategic plan?	Plan is updated by team annually, and may even undergo changes during the school year. Plan contains action steps with an implementation timeline.
6..	Based on your experience, what was the MOST successful aspect of the strategic planning process?	Keeping the plan a living, changing document. Flexibility
7.	What timeframe does your strategic plan cover?	One year.
8.	Who manages the ongoing strategic plan?	Administration, generally, but each action step is assigned a "leader."
9.	How does the strategic plan trickle down into all areas of planning for your school?	Specific plan items address individual actions at the school level.
10.	If you don't have a strategic plan - how do you structure planning?	n/a

School Name:	Contact Name:	Assigned to:
Kings		Steve B

1.	Do you have a formal strategic plan?	Do not have a strategic plan - developing one - not a common plan - around high quality instruction, teaching, and learning now and in the future
2.	Who was involved in creating your strategic plan?	Teachers and whole administration team working together, working with Bill Sears at the Hamilton County Educational Service Center. Plan was focused on innovation and problem solving.
3.	Did you use a consultant? If (YES) who did you use and what was cost?	See above. It is a learning process and we observed what Mariemont does and utilized it. We are implementing the plan

		slowly, keeping in mind key pillars: <ul style="list-style-type: none"> - Relationships - High quality teaching and learning - Innovative mind set - Feedback
4.	How did you engage all stakeholders (or representatives) in the process?	A key focus was on the adults in the community, with the idea that that focus will have a positive impact on the kids.
5.	How did the school develop, review, and evaluate the strategic plan?	
6..	Based on your experience, what was the MOST successful aspect of the strategic planning process?	Focusing on the fact that changing technologies are a part of newest generation of students and utilizing those new technologies will be critical going forward. Further, going through the process helps district employees understand the need for innovation and change.
7.	What timeframe does your strategic plan cover?	We envision a living document.
8.	Who manages the ongoing strategic plan?	Too soon to have been determined.
9.	How does the strategic plan trickle down into all areas of planning for your school?	
10.	If you don't have a strategic plan - how do you structure planning?	

School Name:	Contact Name:	Assigned to:
Milford		Steve B

1.	Do you have a formal strategic plan?	Yes, it is 8 years old and about to be revisited.
2.	Who was involved in creating your strategic plan?	Administration as well as the community were engaged in formulating the plan. Several meetings were conducted to ensure engagement. Each administrator had a role. Teachers, business, leaders -- all were involved in its creation.

3.	Did you use a consultant? If (YES) who did you use and what was cost?	
4.	How did you engage all stakeholders (or representatives) in the process?	Community meetings were scheduled with the purposeful goal of engaging community members.
5.	How did the school develop, review, and evaluate the strategic plan?	Annual goals are created district and building wide which are specifically tied to missions/goals from the plan.
6..	Based on your experience, what was the MOST successful aspect of the strategic planning process?	Simply having a plan in place was beneficial to organizing district planning and goals.
7.	What timeframe does your strategic plan cover?	
8.	Who manages the ongoing strategic plan?	Superintendent
9.	How does the strategic plan trickle down into all areas of planning for your school?	Specific (even building-only) goals are tied to the plan
10.	If you don't have a strategic plan - how do you structure planning?	

School Name:	Contact Name:	Assigned to:
Solon		Steve B

1.	Do you have a formal strategic plan?	Yes. This is my 30 TH year as superintendent. We have been using the strategic plan for 30 years, and it has helped us as the district has been transformed as population has grown.
2.	Who was involved in creating your strategic plan?	It is a bottom-up, not top down, plan. Community members determine the course and direction of the district.
3.	Did you use a consultant? If (YES) who did you use and what was cost?	Yes, Bill Cook who is now located in Alabama (thecambriangroup.org)
4.	How did you engage all stakeholders (or	Efforts were made to engage the

	representatives) in the process?	community, parent groups, teachers and administration.
5.	How did the school develop, review, and evaluate the strategic plan?	We have facilitated updates every five years, with self-review annually. School and private leaders are involved in the annual reviews.
6..	Based on your experience, what was the MOST successful aspect of the strategic planning process?	<ol style="list-style-type: none"> 1) Making the commitment that whatever the group decides will be executed. 2) Being mindful that this is an opportunity for a vocal few to publicly debate/air arguments. 3) Be very comfortable with the facilitator you choose. 4) Be wary of individuals paralyzing the group.
7.	What timeframe does your strategic plan cover?	Five year process with annual or bi-annual updates..
8.	Who manages the ongoing strategic plan?	Superintendent
9.	How does the strategic plan trickle down into all areas of planning for your school?	
10.	If you don't have a strategic plan - how do you structure planning?	

School Name:	Contact Name:	Assigned to:
Mayfield	Keith Kelly	Steve P

Links to some things sent to me:

<https://drive.google.com/file/d/0BzRVPD5a17KBLTVJLTh5dlpkWFp3M2hVbmEweW54eXRPMFIV/view?usp=sharing>

<https://drive.google.com/file/d/0BzRVPD5a17KBdzFoWVpQbEFaOU9KbUxsS1NBcHpGMUFQVmfZ/view?usp=sharing>

<https://drive.google.com/file/d/0BzRVPD5a17KBcmV5VV9VYzFtMVlreU8tcnIUYnM0YIhRVEhZ/view?usp=sharing>

<https://drive.google.com/file/d/0BzRVPD5a17KBUIdPYTdOTlpJZWpkT3dMM1hrRG1ISVI5S2hF/view?usp=sharing>

1.	Do you have a formal strategic plan?	<p>We call our strategic plan, “The Mayfield Vision”. How we go about the work is grounded in the tenets of the Baldrige Model for Quality. The Mayfield Vision/Quality Improvement Process consists of initiatives in four areas we call “Quality Improvement Pillars”:</p> <ul style="list-style-type: none"> ● Student Learning and Academic Excellence ● Fiscal Stewardship and Operations ● Growing Leadership, Talent and Professional Capacity ● Community Relations and Family Partnerships <p>These four Pillars are inherently linked – one depends on the other. I like to say that our Vision is action oriented and focused on student learning. We do what we say we are going to do. The plan is not for show or for the shelf. If it can’t be done then it doesn’t end up in the plan.</p>
2.	Who was involved in creating your strategic plan?	All stakeholders were involved – community, students, teachers, administrators, staff, board etc.
3.	Did you use a consultant? If (YES) who did you use and what was cost?	Yes. Our costs are not one time costs. Our consultant has worked with us in varying capacities for several years. We consider her part of the team.
4.	How did you engage all stakeholders (or representatives) in the process?	Involving stakeholders was not done using the traditional methodologies. Methods for engaging stakeholders depend on the culture (readiness for change, trust in staff, trust in leadership, financial conditions and a desire for action). For us, inviting a representative group consisting of many to one table for long periods of time was not going to work. Our culture was ready for action and yearned to know where we were headed. We took advantage of that climate and moved quickly starting with small improvements (wins) then

taking larger risks that have resulted in extraordinary changes and improvements. See attached for examples.

Our process of engagement went something like this:

- Year 1 (my first year as superintendent) was spent meeting with small homogeneous groups of people – teachers, staff, administrators, parents, mayors, union leadership, clergy, business owners, senior citizens etc. This was done formally and informally. I asked the same simple questions everywhere I went – face to face.
 - What are the fine traditions that should be kept or brought back?
 - What do you want at Mayfield that we don't have – that maybe other school districts have?
 - What about Mayfield is obsolete?
 - What needs to be improved?
 - What should kids be learning (they we don't already provide) to give them the best shot at being successful after high school?

Many themes began to emerge from these questions, from which the Quality Pillars were latter crafted. As these themes emerged, they were communicated to the board of education, central office, administrative team and union leadership.

- Year 2 was spent with the board, central office, and administrative team crafting the Pillars and turning themes into potential actionable work. Time was spent researching best practices. Once there was some meat to the

bones, we brought back a framework to all of the stakeholder groups mentioned above – making presentations and getting feedback. In the meantime, we began making changes that we knew would be wins (resurrecting the committees that were in bargained agreement, reforming the District Leadership Team, adding technology infrastructure and making small improvements to facilities). We didn't wait for the process to conclude – because we see our process as organic and ever developing. By the end of the summer we had prioritized what our stakeholders wanted to see done and how it was we were going to pay for it.

- Year 3 saw the rollout of an actionable vision that concludes in 2018. Formal presentations were made to staff, parent and community groups. Paper and electronic documents were produced to inform the community and staff of the timeline of the Mayfield Vision. See attached examples. We made significant progress toward our goals.
- Year 4 saw more significant progress and accomplishments. Here is a sample from my information newsletter that goes out every month. We use many forms of communication to promote the message of progress.
- Year 5 continues to see progress toward our goals. Here is a sample from my information newsletter that goes out every month.

MAYFIELD VISION UPDATE

Quality Improvement Pillars

		<p><i>Student Learning and Academic Excellence</i></p> <p>The teachers involved in blended learning action research are off and running. Each teacher has been equipped with a Chromebook cart for use in the teaching and learning process.</p> <p>The 3 -year plan to provide every student in grades 5-12 a Chromebook is well underway. 900 Chromebooks were purchased this summer in preparation. PD is the precursor to distribution. The levy must pass to complete this plan.</p> <p>The STEM2M - engineering and biomed programs have progressed to include the next courses in their respective sequences. 9th and 10th graders are taking courses at the Mayfield Innovation Center in Introduction to Engineering Design, Principles of Engineering, Principles of Biomedical Science and Human Body Systems. AP Computer Science was added this year as well as Gaming and Technological Careers in Art at MMS. Discussions about how the ARTS fit into STEM2M have begun.</p> <p>Lander is in process of developing their Makerspace classroom for students – complete with a Lego wall. Thank you Lander PTG!</p> <p>Literacy work at the Elementary Schools, MHS and MMS is focusing on writing across all disciplines.</p> <p>The RTI process will continue to be developed throughout this school year.</p> <p><i>Growing Leadership, Talent and Professional</i></p>
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		<p>Capacity</p> <p>BLT's are focusing on instruction like never before.</p> <p>The feedback from the first PD day, imbedded in the school year, was mostly positive. Improvements will be made based on the plus/delta.</p> <p>The Literacy Committee met and began crafting a roadmap for literacy instruction across the district.</p> <p>Principals are engaged in a book study and discussion on focused instructional leadership.</p> <p>The Instructional Innovation Committee continues the work of fitting the principles of innovation with the processes of teaching and learning.</p> <p>The Blended Learning Committee continues their work in defining and setting the direction for the use technology as a tool for engaged learning. Students are imbedded in this committee.</p> <p>Kelly's Korner</p> <p>Quality Improvement Pillars (cont.)</p> <p>Developing the PLC model across the district is a major focus this year. We are ALL IN on this model!</p> <p>Fiscal Stewardship and Operations</p> <p>A 6.9 mills levy will be on the ballot in November. 5.0 mills for operating and 1.9 for permanent improvements. See Q&A in Your Mayfield Schools Newsletter. Scott and I have made presentations to over a dozen community groups about the need for</p>
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		<p>a tax levy and the value of education at Mayfield.</p> <p>Landscaping improvements at our elementary schools are nearing completion.</p> <p>Preliminary analysis and plans for HVAC and additional renovations to the middle school are underway. This project is levy dependent.</p> <p>Process and procedures for addressing mental health needs in the vent of a crisis have been established and will communicated soon.</p> <p><i>Community Relations and Family Partnerships</i></p> <p>The Quality Profile will be sent to our community and staff in September ahead of the state report card.</p> <p>Communications regarding the need for a levy have begun.</p> <p>Our business and community partnerships continue to grow.</p> <p>Progressive engineers are working with math and engineering students.</p> <p>Rockwell Automation has reached out to us regarding their robotics programs. The Cuyahoga County Library wants to partner on providing homework help. We have made an important contact with Phillips and the Cleveland Clinic continues to support at impressive levels.</p>
5.	How did the school develop, review, and evaluate the strategic plan?	<p>See above.</p> <p>Review and evaluation of the plan is constant. It is discussed at every DLT, Cabinet and Admin Team meeting. We hold regular work sessions with the board and each principal presents once a year at a board meeting on some</p>

		<p>element of the Mayfield Vision. Building staff meetings have shifted from informational to instructional focusing on student learning related to the Vision. My goals, the treasurer's goals and the goals of all administrators and supervisors are aligned to the Mayfield Vision and Quality Improvement Process. The building goals are also aligned and articulated. Building Leadership Teams discuss and evaluate their goals.</p> <p>Evaluation comes in many forms. The methods by which we measure success or failure is dependent on the desired outcome.</p>
6..	Based on your experience, what was the MOST successful aspect of the strategic planning process?	Seeing things change and improve for kids.
7.	What timeframe does your strategic plan cover?	6 years. We have begun working on the next 6 years since this plan concludes in 2018.
8.	Who manages the ongoing strategic plan?	In –district stakeholders share in development and management. With administrative oversight depending on the initiative. However, it is a wonderful thing to watch our staff take more and more ownership of what happens (ie. Blended Learning Committee).
9.	How does the strategic plan trickle down into all areas of planning for your school?	See above. There is beginning to be a shift from trickle down to bubble up! The culture of innovation is growing. See attached slide presentation – teachers made this happen! This presentation was made to all high school staff by teachers.
10.	If you don't have a strategic plan - how do you structure planning?	

School Name:	Contact Name:	Assigned to:
Upper Arlington	Paul Imhoff	Steve P

Here is a link to their strategic plan: [Upper Arlington Strategic Plan](#)

1.	Do you have a formal strategic plan?	Yes
2.	Who was involved in creating your strategic plan?	<i>We worked with Battelle for Kids to create a new hybrid planning process that combined the best from the private and public sectors. Together we created three work teams and an oversight committee that were made up of community volunteers, staff members and a research consultant from BFK.</i>
3.	Did you use a consultant? If (YES) who did you use and what was cost?	
4.	How did you engage all stakeholders (or representatives) in the process?	<i>All groups were represented in the process and there were several opportunities for participation and feedback.</i>
5.	How did the school develop, review, and evaluate the strategic plan?	<i>We met as a leadership team several times to craft the plan based upon the findings of our three work teams.</i>
6..	Based on your experience, what was the MOST successful aspect of the strategic planning process?	<i>Staying focused on what matters most to our students. The final plan has only five goals.</i>
7.	What timeframe does your strategic plan cover?	2015-2018
8.	Who manages the ongoing strategic plan?	<i>The entire leadership team has a stake in managing the plan. The efficiency, ownership and accountability goals are largely managed by our central office team. The performance and personalization goals are managed by our teaching and learning department as well as building principals.</i>
9.	How does the strategic plan trickle down into all areas of planning for your school?	<i>Each year our schools set their own goals based upon the goals of the strategic plan. This keeps all of our staff working in the same direction.</i>
10.	If you don't have a strategic plan - how do you structure planning?	

School Name:	Contact Name:	Assigned to:
Ursuline	<u>Sharon Redmond</u>	Lindsey

1.	Do you have a formal strategic plan?	Yes we have a strategic plan (This is the 3rd
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		strategic plan that I have been involved in since 2001)
2.	Who was involved in creating your strategic plan?	Obviously. we had input from all constituent groups through interviews, focus groups, surveys ... We formed a strategic planning committee which consisted of representation from the Board of Trustees, president, principal, and one of two reps from our faculty and alumnae.
3.	Did you use a consultant? If (YES) who did you use and what was cost?	We did for 2 of the past 3 - Advancement partners, Field Development Consultants, INC. Advancement Partners was more expensive and less effective. We have worked with Field Development Consultants on a couple of different projects... including Board Retreats and strategic planning... Dan Eddingfield is my contact and they are out of Columbus... ceddingf@columbus.rr.com Phone 614 433-7965
4.	How did you engage all stakeholders (or representatives) in the process?	Stated in #2
5.	How did the school develop, review, and evaluate the strategic plan?	Sought input through focus groups, surveys, SWOT analysis, my vision for the school Analyzed all the data and created the plan based on those outcomes and needs I review the strategic plan at every Board meeting and my annual goals and the goals of our Board support the plan
6..	Based on your experience, what was the MOST successful aspect of the strategic planning process?	
7.	What timeframe does your strategic plan cover?	3 to 5 years
8.	Who manages the ongoing strategic plan?	I do in conjunction with the committee and Board
9.	How does the strategic plan trickle down into all areas of planning for your school?	Actually ours is a grass roots planning process - we have worked to align our goals for the school, as well as our individual professional goals, with the mission of Ursuline and the strategic plan.
10.	If you don't have a strategic plan - how do you structure planning?	

B. Interviews: Consultants:

<u>Consultant Name:</u>	<u>Contact Name:</u>	<u>Assigned to:</u>
Yunker Group	Jim Yunker	Dave

1	What are some names/examples of recent schools you have helped in Strategic Planning?	Have conducted/facilitated strategic planning process for school fundraising groups/foundations, but not districts.
2	What does your SP process look like (approach, timeline, cost)?	Will work with group on developing this.
3	Who should be involved (from Madeira schools) in this process?	Strongly encourage mix of administration, staff, and community members
4	What are the benefits) of using a consultant verses in-house?	Without trying to sell himself, he felt that any serious strategic planning process should have an outside facilitator.

Mr. Yunker provided a statement of interest which is at the end of this appendix.

<u>Consultant Name:</u>	<u>Contact Name:</u>	<u>Assigned to:</u>
Pathway Guidance	Lisa Nack	Amanda

Examples of Schools that you have helped create SP:	Departments at Xavier
Average length of time for process:	Phase 1 - PreWork (2 Weeks) Phase 2- Strategy Development (Session 1 - 2 Days, Session 2 - 1 Day, Session 3 - 1 Day) Phase 3 - Strategy Support
Average cost for consulting:	\$26,550
Average Group Size (for Planning)	4-8 People

<u>Consultant Name:</u>	<u>Contact Name:</u>	<u>Assigned to:</u>
Hamilton Educational Service Center	Bill Sears	Amanda

Hamilton County Educational Service Center has facilitated strategic planning for both school districts and business. Some of your questions are difficult to answer because we work to customize the strategic planning process to meet the needs of our customer. For example some want us to facilitate the process where they define their core beliefs, vision and determine their key focus areas. They then create their own action plans. Others want us to facilitate all aspects of the process through implementation. We have one customer who is taking about 24 months to create a district strategic learning plan that will change instruction and learning to match the needs of their students 10-15 years from now. We enjoy this work but as you can see the cost and time of the process varies dramatically.

Here are the (best attempt)answers to your questions:

Examples of Schools that you have helped create SP:	Talawanda, New Richmond, Goshen, Greenon Local, Wayne Local, Kings
Average length of time for process:	Varies- from 6 months to over a year
Average cost for consulting:	\$2,000-5,000
Average Group Size (for Planning)	approximately 25 (some as large as 40)

IV. School Response Information Summarized and Sorted by Response:

1	Do you have a formal strategic plan? Of those who responded, 11 Yes, 3 No
	Insights: Even those who were “No” largely indicated that they were planning to create one in the near future.

2.	Who was involved in creating your strategic plan?
	<ul style="list-style-type: none"> · Students, staff, parents, administrators, community members and board members (Forest Hills) · We had community members, business leaders, administrators and teachers (Mason) · Administration, board, staff, even parents and students, with the group growing intentionally during process (Sycamore)

	<ul style="list-style-type: none"> · Teachers and whole admin team . . . with facilitator (Kings) · All stakeholders were involved – community, students, teachers, administrators, staff, board etc. (Mayfield) · We created three work teams and an oversight committee that were made up of community volunteers, staff members and a research consultant from BFK. (Upper Arlington) · Obviously. we had input from all constituent groups through interviews, focus groups, surveys ... We formed a strategic planning committee which consisted of representation from the Board of Trustees, president, principal, and one of two reps from our faculty and alumnae. (Ursuline)
	<p>Insights: Having cross-representation from a variety of key stakeholders is critical to “buy-in” for any strategic plan.</p>

3.	<p>Did you use a consultant? If (YES) who did you use and what was cost?</p>
	<ul style="list-style-type: none"> · No (Forest Hills) · Rick Gregory, creative thinking facilitator, P&G Gym. (Mason) · Yes, it was Mike Stabile at http://www.futurenowed.com/about.html Can't remember cost, but was reasonable. (Sycamore) · LEARNING PROCESS AND LEARNING AS YOU GO. STOLE THE IDEA FROM MARIEMONT. THEY DID IT IN A YEAR AND A HALF. HE IS DOING IT IN A YEAR. CONSOLIDATE – THROUGHOUT THIS YEAR THEY WILL DEVELOP THE PLAN AND THEN A SLOW Implementation – five pillars: Relationships, High quality teaching and learning, Innovative mind set, Feedback. USED BILL COOK. HE SOLD THE BUSINESS AND NOW BACK INTO THE BUSINESS. CAMBRIAN GROUP · Yes. Our costs are not one time costs. Our consultant has worked with us in varying capacities for several years. We consider her part of the team. (Mayfield) · We did for 2 of the past 3 - Advancement partners, Field Development Consultants, INC. Advancement Partners was more expensive and less effective. We have worked with Field Development Consultants on a couple of different projects... including Board Retreats and strategic planning... Dan Eddingfield is my contact and they are out of Columbus... ceddingf@columbus.rr.com Phone 614 433-7965 (Ursuline)
	<p>Insights: No district went through a formal process without a consultant, and no district indicated that they would have preferred to create and implement a strategic plan without a consultant. However, a</p>

few districts utilize the equivalent of a strategic plan and developed it “in-house” without a formal consultant. Some still engage with the consultant for review, others don’t.

4.	How did you engage all stakeholders (or representatives) in the process?
	<ul style="list-style-type: none"> · Focus groups, staff meetings, surveys, strategic vision committee (Forest Hills) · Rick Gregory brought in a different approach by using wall size charts, music, hula hoops, visual charts to help us create a plan. (Mason) · Used a small group to start, then spread out the reach of those involved (Sycamore) · ENGAGING COMMUNITY, TEACHERS ADMIN AND PARENT GROUPS FROM EACH BUILDING. FACILITATION IS EXTREMELY SKILLED. INFORMATION BACK IS RIGHT ON (Solon) <div data-bbox="245 869 1334 1205" style="border: 1px solid black; background-color: #00FFFF; padding: 5px;"> <p>Involving stakeholders was not done using the traditional methodologies. Methods for engaging stakeholders depend on the culture (readiness for change, trust in staff, trust in leadership, financial conditions and a desire for action). For us, inviting a representative group consisting of many to one table for long periods of time was not going to work. Our culture was ready for action and yearned to know where we were headed. We took advantage of that climate and moved quickly starting with small improvements (wins) then taking larger risks that have resulted in extraordinary changes and improvements . . (Mayfield)</p> </div> <ul style="list-style-type: none"> · All groups were represented in the process and there were several opportunities for participation and feedback. (Upper Arlington) · Board retreats and meetings (Ursuline)
	<p>Insights: Having a purposeful plan to ensure wide-spread engagement seemed to be a successful strategy.</p>

5.	How did the school develop, review, and evaluate the strategic plan?
	<ul style="list-style-type: none"> · Started with administrator collective commitment design from which I created themes and goal statements. From there we continued to refine values, beliefs, goals, objectives, action plans. We then used a strategic vision committee made up of ten representatives that represent the entire district to refine all aspects into a proposal for Board Members, inclusive of recommendations for implementation. (Forest Hills) · We first looked back at the history of Mason and mapped what brought

us to where we were then using this visual mapping process. We then spent time looking at what was possible for students in Mason and developed 4 Bold Steps. These 4 Bold Steps were the anchors for our Annual Goals and Priorities and we had community members, business leaders, administrators and teachers working on these 4 committees to create action items (goals and priorities) for each one. We had so much fun creating this plan and it has really come to life in our district. We have since condensed the Bold Steps to 3 areas and develop our goals/priorities and metrics each year around these 3 anchor areas (which are the core of our Mission Statement). We no longer need a facilitator We wanted a vision that everyone could articulate and live each day: Growing Greatness Together. We chose each of those three words very purposely and they exemplify what we strive for in Mason. Growing - we are a learning, growing organization and strive to get better each day. Greatness - we are not resting on our laurels and strive for greatness and excellence in everything we do, continually looking for innovative approaches that will provide our students opportunities beyond all other places. Together - we are in the people business and we work together to accomplish all of this with our families, community, students and staff. "If you want to go fast, go alone. If you want to go far, go together" We want to go far! Wrapped in these three words are our values: Collaboration, Learning, Diversity, Innovation, Integrity, Excellence, Service. and we do this work together each year and just recently revised our vision. We wanted a vision that everyone could articulate and live each day: Growing Greatness Together. We chose each of those three words very purposely and they exemplify what we strive for in Mason. Growing - we are a learning, growing organization and strive to get better each day. Greatness - we are not resting on our laurels and strive for greatness and excellence in everything we do, continually looking for innovative approaches that will provide our students opportunities beyond all other places. Together - we are in the people business and we work together to accomplish all of this with our families, community, students and staff. "If you want to go fast, go alone. If you want to go far, go together" We want to go far! Wrapped in these three words are our values: Collaboration, Learning, Diversity, Innovation, Integrity, Excellence, Service. (Mason)

- Annual retreat with board; plan is reviewed purposefully (Sycamore)
- BRING THEM IN FOR THE UPDATES AS WELL NOT JUST EVERY FIVE YEARS. ANNUAL REVIEW. SCHOOL LEADER AND PRIVATE CITIZEN LEADER AS WELL GOES OUT AND REVIEWS (Solon)\
- Review and evaluation of the plan is constant. It is discussed at every DLT, Cabinet and Admin Team meeting. We hold regular work sessions with the board and each principal presents once a year at a board meeting on

	<p>some element of the Mayfield Vision. Building staff meetings have shifted from informational to instructional focusing on student learning related to the Vision. My goals, the treasurer's goals and the goals of all administrators and supervisors are aligned to the Mayfield Vision and Quality Improvement Process. The building goals are also aligned and articulated. Building Leadership Teams discuss and evaluate their goals. Evaluation comes in many forms. The methods by which we measure success or failure is dependent on the desired outcome. (Mayfield)</p> <ul style="list-style-type: none"> · We met as a leadership team several times to craft the plan based upon the findings of our three work teams. (Upper Arlington) · Sought input through focus groups, surveys, SWOT analysis, my vision for the school Analyzed all the data and created the plan based on those outcomes and needs. I review the strategic plan at every Board meeting and my annual goals and the goals of our Board support the plan (Ursuline)
	<p>Insights: There are a variety of different ways to ensure that any strategic plan is successfully created and implemented, but common traits of successful ongoing plans include flexibility, accountability (particularly placed on one or a few people), and reviewability.</p>

6.	Based on your experience, what was the MOST successful aspect of the strategic planning process?
	<ul style="list-style-type: none"> · 120 people in one room facilitated by one person. Massive amount of information was retrieved using an appreciate inquiry process. (Forest Hills) · The most successful part of the process is seeing everyone invested in Growing Greatness Together! (Mason) <ul style="list-style-type: none"> ● (1) Flexibility to tweak. Things move quickly and you need a plan which can adjust when required. (2) Ensuring that stakeholders are properly heard (Sycamore) ● FOCUSED ON TEAM AND DISTRICT WITH WE ARE DEALING WITH DIFFERENT KIDS – GEN D – TECHNOLOGY THEY ARE BORN INTO. CHANGE MINDSET THAT CHANGE NEEDS TO OCCUR AND BRING THE CHANGE IN – UNDERSTAND THE WHY!!!! WE ALWAYS JUMP TO THE WHAT – HAS HELPED AS A LEADER AS WELL ● ALWAYS MADE THE COMMITMENT THAT WHATEVER THE GROUPS DECIDES WE WILL EXECUTE – END OF EVERY YEAR THEY GO THROUGH AND BE ACCOUNTABLE. MAKE IT PART OF EVALUATION. TOTALLY INTEGRATION INTO REVIEW AND PLANNING OF DISTRICT BE CAREFUL: CONSIDER IT AND IT IS A PUBLIC PLANNING PROCESS AND ALLOWS YOU TO PLAN WITH

	<p>THE COMMUNITY AND CITIZENS “ARGUE” DIALOGUE WITH EACH OTHER WHICH ISSUES ARE IMPORTANT. YOU KNOW EXACTLY WHERE YOU ARE GOING WHOEVER YOU USE – MAKE SURE YOU ARE COMFORTABLE WITH FACILITATOR. FACILITATOR CAN CONTINUE TO LET THEM DRILL THE SCHOOLS OR MOVE THEM FORWARD DO NOT LET INDIVIDUALS PARALYZE THE GROUP.</p> <ul style="list-style-type: none"> • Seeing things change and improve for kids. (Mayfield) • Staying focused on what matters most to our students. The final plan has only five goals. (Upper Arlington) • Bringing constituents together to speak candidly about the strengths and challenges of the school as well as the opportunity to dream and envision the possibilities for our future. (Ursuline)
	<p>Insights: Two recurring themes: 1) admin, staff, parents, and students report actually seeing positive change and 2) it enhances the district’s standing with the entire community.</p>

7.	What timeframe does your strategic plan cover?
	<ul style="list-style-type: none"> · 5 Years (Forest Hills) · We develop our district goals and priorities annually. We revisit the plan each year and determine if we are on the right track and adjust. (Mason) · 5 years, but it has been longer. However, remains viable because it receives annual attention and adjustments. (Sycamore) · KIND OF SEEING IT AS A LIVING DOCUMENT. GOING TO CREATE IT FOR WHAT LEARNING LOOKS LIKE IN THE FUTURE – CONTINUE TO EVALUATE INSTRUCTION and PRACTICES AND TWEAK THE PLAN – FAIL TO EVALUATE. WHAT WE HAVE DONE AND BUILD THAT IN · 2015-2018 (Upper Arlington) · IT IS NOT A YEARLY PLAN – FIVE YEAR PROCESS WITH ANNUAL OR BI ANNUAL UPDATES. 4 SEPARATE PLANS DURING THAT 30 YEAR PLAN · 6 years. We have begun working on the next 6 years since this plan concludes in 2018. (Mayfield) · 3-5 Years
	<p>Insights: Typically 3-6 years.</p>

8.	Who manages the ongoing strategic plan?
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	<ul style="list-style-type: none"> · superintendent, cabinet and then building and department level continuous improvement plans which are aligned to the plan (Forest Hills) · Karen Naber (Assistant Superintendent) (Sycamore) · Because we don't have the traditional strategic plan, we don't have a single person managing it. Many individuals are responsible for various aspects of our work. Our public information officer usually puts most of the information together for us, but it is a shared document so many people contribute to that as well. (Mason) · NOT FAR ENOUGH ALONG – RESEARCH – INTERESTING AND LOOKING AT FIVE PILLARS. NEED TO DO MORE LEARNING AS A GROUP. NEXT STEP – PROFESSIONAL DEVELOPMENT AROUND THE PILLARS – STAFF DOES NOT UNDERSTAND WHAT INNOVATION IS – REALLY NOT TECHNOLOGY – NOTHING IN THE PLAN ABOUT TECHNOLOGY – WANT TO UTILIZE TO ENHANCE LEARNING – HOW TO USE TECHNOLOGY TO TRANSFORM TECHNOLOGY. · SUPER IS RESPONSIBLE AND ACCOUNTABLE · In –district stakeholders share in development and management. With administrative oversight depending on the initiative. However, it is a wonderful thing to watch our staff take more and more ownership of what happens (ie. Blended Learning Committee). (Mayfield) · The entire leadership team has a stake in managing the plan. The efficiency, ownership and accountability goals are largely managed by our central office team. The performance and personalization goals are managed by our teaching and learning department as well as building principals. (Upper Arlington) · I (Sharon Redmond) do in conjunction with the committee and Board (Ursuline)
	<p>Insights: A key individual or two is often tasked with keeping the strategic plan a living and frequently-referenced document within the district.</p>

9.	How does the strategic plan trickle down into all areas of planning for your school?
	<ul style="list-style-type: none"> · CIP building leadership teams (Forest Hills) · We develop our district goals and priorities annually and then each Building, Administrator, Dept, and teachers develop their priorities based on the district ones. More importantly, the plan, the goals and vision are part of our daily work. (Mason) · It impacts every aspect, from curriculum to physical plant issues. · Each year our schools set their own goals based upon the goals of the strategic plan. This keeps all of our staff working in the same direction. (Upper Arlington)

	<ul style="list-style-type: none"> · Actually ours is a grass roots planning process - we have worked to align our goals for the school, as well as our individual professional goals, with the mission of Ursuline and the strategic plan. (Ursuline)
	<p>Insights: Districts often create a variety of specific goals based on the strategic plan, but use different approaches to achieve this. Regardless of the approach, it seems that intentionally creating a way to ensure that the strategic plan imprints other planning processes is critical.</p>

10	If you don't have a strategic plan - how do you structure planning?
	<ul style="list-style-type: none"> · We don't actually have a strategic plan, but it is something we are considering. We have yearly goals that are established by the BOE, Admin Team and Teachers. We used an organization called LEI to help us set our goals. (Deer Park) · Indian Hill is looking into the possibility of exploring creating a strategic plan or conducting a strategic planning process. Currently, it utilizes an "informal" plan. Annually, principals, with teacher-leaders, develop an annual goal or informal plan with respect to usually academic goals in mind. The District also has a physical plant plan for upkeep/maintenance, etc. (Indian Hill)
	<p>Insights: Everyone plans at some level, but schools without a formal plan (like Madeira) seem to be considering or working toward the strategic planning process.</p>

V. Additional Information

Some web links with interesting information/questions:

- <http://www.kent.k12.wa.us/strategicplan>
- <http://www.montgomeryschoolsmd.org/info/baldrige/documents/RequirementsPlanning.pdf>
- <http://www.westminster.net/strategic-plan/index.html>
- [Upper Arlington Strategic Plan](#)