

WISCONSIN ASSOCIATION OF SCHOOL BOARDS

*Fostering effective school board
practices for student success.*

ORGANIZATIONAL SERVICES PROPOSAL

PREPARED FOR

WATERFORD GRADED
October 2015



Provided by:
Organizational Consulting Services

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Introduction

The Waterford Graded School District has requested a proposal for Stakeholder Strategic Planning. A district's strategic plan is the foundation of improved student and institution performance. It is the foundational tool that school leaders utilize to connect with community, staff, parents and students. It is not only a reflection of the community values but an instrument through which leaders can turn the mission and vision into action.

Strategic planning is not a new tool in the search of educational excellence. The current challenge is to utilize a strategic planning process that fits all size school districts. The districts most at risk for not developing a strategic plan are smaller and those with limited resources. In the search for a strategic planning process that can be used by small and large schools alike, the research kept connecting and reconnecting to the Malcolm Baldrige Performance Excellence Program. The Baldrige Excellence Program integrates strategic planning as a key component of performance excellence. It is also one step in many that focuses on student and institution performance. There are those that will say if strategic planning is a priority, it does not matter how much work it involves or the cost of the planning process. The reality is small and medium size school districts do not have the institutional energy or capacity to initiate complex or long term planning processes. The process outlined in this document is designed to fit all size school districts, connect with their community and link with school district stakeholders.

Community involvement is a key component to the strategic planning process. Community members are involved in the planning steering committee and the community at-large is given an opportunity for input through a survey process. The community or stakeholders play an important role in the development of the strategic plan and the planning process. The end result is a document to guide the improvement process for the next three years.

Stakeholder-driven planning links the local community with the school district by planning strategically. In order to perform at high levels, school districts must have a written plan connected with community values, educational best practice and an unrelenting focus on student learning. This written plan not only reflects community values, but it systematically aligns the mission and vision with school district actions or initiatives. The written plan is reviewed yearly, updated frequently and monitored regularly.

The WASB Organizational Services Team is looking forward to the future discussion of the project scope and meeting the needs of the Waterford Graded School District.

OVERVIEW OF FEATURES OF WASB'S STRATEGIC PLANNING PROCESS

Community Involvement

- A central strategic planning committee of about 15-20 community members, including board members, act as a steering committee.
- Many members of your community can give input into the planning process through online/paper and pencil surveys.
- All stakeholder groups in the community are encouraged to participate and are represented in the steering committee (teachers, parents, students, political leaders, clergy, law enforcement, social services--can participate in the process).

Flexible Timeline

- The entire process can be completed in the time span of 2-3 months or it can be scheduled over a longer time span. The time line is based on District and participant willingness to meet.
- Approximately 4-5 planning committee meetings of 2-3 hours each are required, with additional meetings required for administrative staff.

Process Integrity

- The process is based on the book *Stakeholder-driven Strategic Planning for Education* by Robert Ewy.
- The process has been used in hundreds of school districts across the country.
- The process helps your board focus on and manage the significant changes school districts in Wisconsin will experience in the next 3-5 years.
- The process results in a strategic planning document that can be your planning "anchor" for the next 3 years.

Local Process Customization

- You can focus the process on particular local issues that need attention.
- Additional WASB staff is available to become involved in the process if the District desires to expand the scope of the process.

WISCONSIN ASSOCIATION OF SCHOOL BOARD'S APPROACH TO STAKEHOLDER-STRATEGIC PLANNING

Phases of Planning

1. Determine membership of strategic planning team.
2. Environmental Scan; Survey key stakeholder groups.
 - What is happening within the school district?
 - What is happening in the region?
 - What is happening in the state and nation?
 - What is happening in the world?

Survey Stakeholders

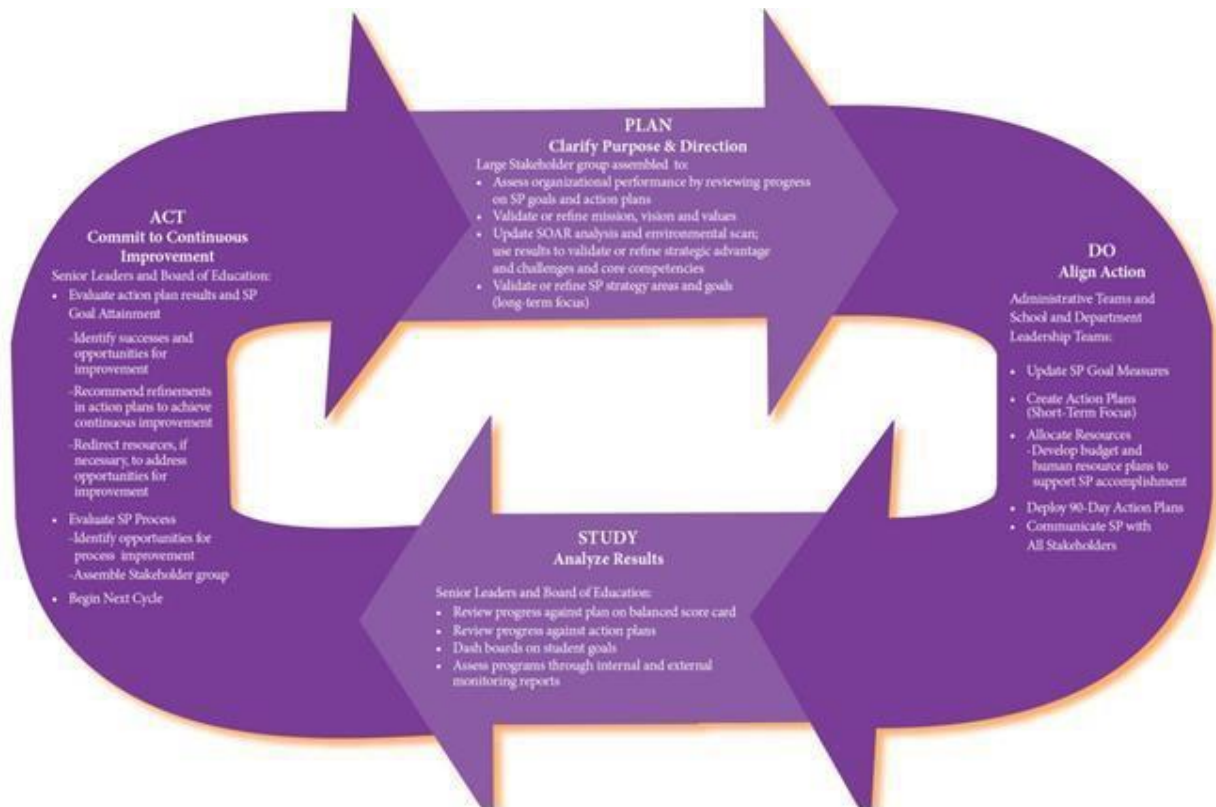
- What are the greatest challenges or issues this school district has to address over the next five years?
 - What are the most important skills and abilities students need to know or be able to do to be prepared for a successful future?
 - What evidence do you use to evaluate the quality of education in our school district?
 - What should the financial priorities be for our school district during the next five years?
 - What could the school district do that would delight you?
 - What information or advice would you give the strategic planning team as they make decisions about long-term priorities and goals?
3. Identify stakeholder requirements and expectations through analysis of survey data.
 4. Identify current district performance levels using Baldrige-based internal audit process and then complete SOAR analysis (i.e. Strengths, Opportunities, Aspirations, Results).
 5. Develop a Strategic Plan based on stakeholder expectations.
 6. Finalize Strategic Plan through Board of Education approval
 8. Develop a Deployment Plan that cascades the plan to all levels in the district.

*Entire process takes 2-6 months

Plan Deployment

Once the planning process is complete, the work begins. There are a number of methods for deployment of the strategic plan. The model of deployment is selected based on the local conditions, leadership and community expectations.

A simple model of deployment that has been effective in a number of planning and improvement structures is called the Plan-Do-Study-Act (PDSA). This model structures the monitoring of yearly goals every ninety days and allows the district to review the entire strategic plan with the public and Steering Committee once a year. Each Board of Education develops a monitoring structure which fits their local governance structure.



The District can also use the strategic plan as a tool for linking and communicating with the public. This will move the plan beyond the board room into the community. The accomplishments and challenges of the strategic plan are then used as speaking points when engaging the public.

Appendix – A

Consultant Background

Louis J. Birchbauer, Ph.D.

WASB Search Services Consultant, Wisconsin Association of School Boards

Dr. Louis J. Birchbauer has dedicated more than 35 years to working with Wisconsin public school districts. After receiving his undergraduate and master program degrees from the University of Wisconsin-Milwaukee, Dr. Birchbauer cultivated his passion for education by earning his educational administration specialist certificate and then his Ph.D. from the University of Wisconsin-Madison. He has conducted WASB superintendent searches for districts throughout Wisconsin since 2007. Also, Dr. Birchbauer is a consultant analyzing organizational effectiveness of school districts through the WASB Organizational Consulting Services. Dr. Birchbauer serves as an adjunct professor at Marquette University and Concordia University in the field of Educational Administration.

Previous Experience

Dr. Birchbauer taught mathematics and science at Wauwatosa Public Schools prior to pursuing his career as a superintendent. Dr. Birchbauer served as superintendent for nearly 30 consecutive years at Wisconsin school districts including Cambria-Friesland, Mosinee, Germantown, and Greenfield. He retired as superintendent of schools from the Greenfield School District in July 2007, and currently resides in Greenfield with his wife.

Education

B.S. in Mathematics, Minor – Physics, UW-Milwaukee

M.S. in Curriculum and Instruction, UW-Milwaukee

Educational Administration Specialist/Educational Administration, UW-Madison

Ph.D. Educational Administration, Minor - Curriculum and Instruction, UW-Madison

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Appendix – B Consultant Background

Al Brown, Ed.D.

WASB Organizational Services Consultant, Wisconsin Association of School Boards

Dr. Al Brown has served Wisconsin school districts and students for more than 38 years and is committed to developing quality leadership structures, while working with Wisconsin public school districts. After receiving his undergraduate and master program degrees from the University of Wisconsin-Stout, Dr. Brown continued his passion for education by earning his educational administration specialist certificate from the University of Wisconsin-Superior and then his doctorate from the Bethel University in St. Paul, Minnesota. He has presented educational information and has conducted workshops for Wisconsin School Board Association, Wisconsin Association School District Administrators, Wisconsin Department of Public Instruction and a number of other regional and local levels. These workshops have been on a number of educational issues, but governance, leadership, collaboration and school district re-organization are the subjects of current interest. Dr. Brown is a consultant with the WASB Organizational Services Program and also serves as an educational consultant for CESA #11 in the area of Educator Effectiveness and educator professional evaluation.

Previous Experience

Dr. Brown taught Technology Education at Waukesha and Little Chute Public Schools prior to pursuing his career as a Principal and Superintendent. Dr. Brown served as superintendent for 22 consecutive years with the Crivitz and Chetek-Weyerhaeuser School Districts. He retired from the Chetek-Weyerhaeuser Area School District in July 2013, and served as interim superintendent for the School District of Ladysmith for the 2014-15 school year.

Education

B.S., Industrial Education, UW-Stout
M.S., Technology Education, UW-Stout
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