



Education Elements

101 Hickey Blvd., STE A #526
South San Francisco, CA 94080

West Ada School District Strategic Planning

February 2022

Our Understanding

Thank you for requesting information about Education Elements' strategic planning services. We are confident that we have the experience, knowledge, and capability to successfully deliver against and exceed your expectations.

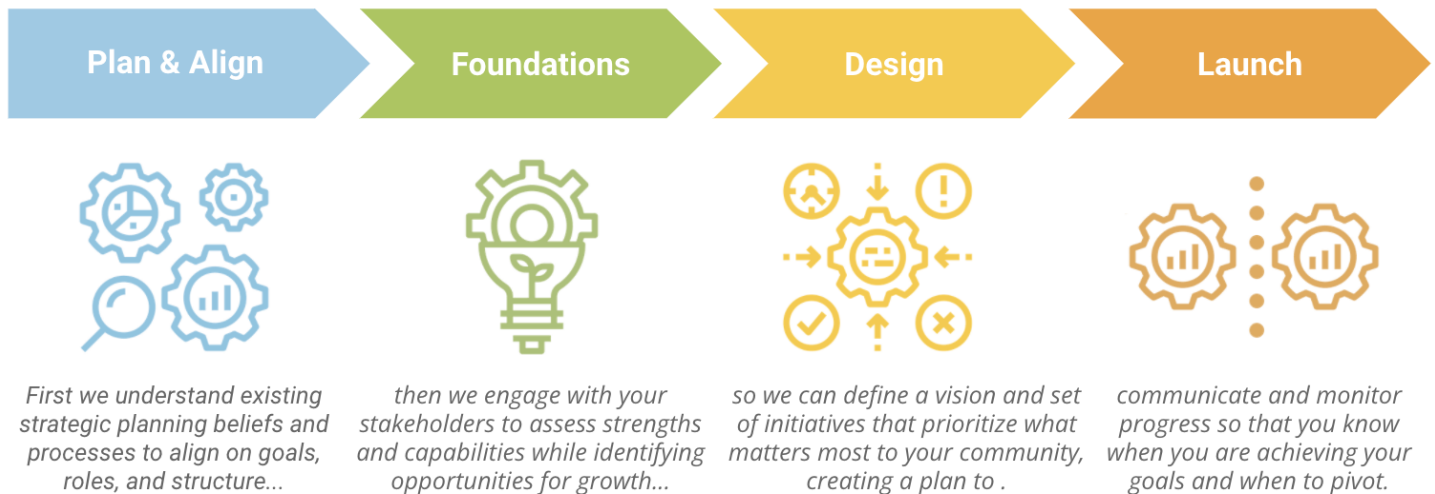
- West Ada School District is the largest school district in Idaho, educating nearly 40,000 students in 57 schools across a large region of the state. The district is growing annually.
- The district is seeking a partner to develop a Comprehensive Strategic Plan that allows district departments and its wide range of schools to be aligned on vision, goals, and priorities. This strategic plan will focus on and be rooted in a coherent current and comprehensive Portrait of a Graduate. The process will include plans to monitor for progress and opportunities for flexibility and iteration along the way.
- West Ada School District is looking for an external partner as they develop this Portrait of a Graduate and Comprehensive Strategic Plan. In particular, the district is looking for an external partner who will prioritize community engagement and buy-in and the development of internal capacity for ongoing responsive planning and strategy.
- Education Elements is uniquely qualified to guide district leaders in this work. We are an education consulting firm that, since 2010, has worked with more than 200 districts and networks and 950 schools across the United States. We are a team of passionate, mission-driven former educators -- teachers, coaches, principals, district administrators, data experts -- all of whom are committed to improving student outcomes.

Our Strategic Planning Approach

At Education Elements, we challenge our district partners to focus more on the planning process rather than a static plan as the end goal. We also look to empower the West Ada School District team to engage directly with the community and incorporate their expertise into the process. By focusing the planning processes, districts are better able to:

- Deepen awareness of community needs, strengthening relationships and support
- Build coherence and alignment across district, school and departmental initiatives
- Build knowledge of leading strategic planning and implementation practices
- Prioritize efforts to maximize value for students, families and the community at large
- Design structures to look ahead and adapt plans when new information is known
- Define success metrics that communicate progress and build overall confidence in the plan's execution

Our methodology is straightforward, following the four-step process outlined below. Each step builds your team's confidence in the strategic planning process, expands their knowledge of planning tools and tactics, and provides them opportunities to define the future for students in your district. Our methodology is customized to meet your needs of where you are on the journey.



The proposal outlined below includes the **Plan & Align, Foundations, Design, and Launch** phases. Key project deliverables include:

- *Strategic Direction*
- *Strategic Priorities and metrics for monitoring and growth*
- *Short-term plan of action*

- External facing summary document (professionally and custom designed)
- Final Presentation of Strategic Plan
- Project Overview Document with roadmap and team members

While the scope includes strategies for how to Monitor progress made towards the district’s strategic goals, it does not include Education Elements supporting the implementation of your strategic plan. Deliverables included in this proposal that will set the district up for successful progress monitoring include:

Approach Overview

Phase	Plan and Align	Foundations	Design	Launch
Format	Virtual	Virtual + Onsite	Virtual + Onsite	Virtual
Timing	4 weeks	6 weeks	4 weeks	6 weeks
Mile Marker	Governance Structure + Stakeholder Planning	Stakeholder Engagement + Strategic Direction	Initiatives, Program and Prioritization	Designed Final Plan + Communication Strategy

Detailed Approach

Plan + Align ~4 Weeks

Understand existing strategic planning beliefs and processes to align on goals, roles and structure.

EDUCATION ELEMENTS ACTIVITIES	DISTRICT ACTIVITIES	DELIVERABLES
<ul style="list-style-type: none"> • Build knowledge of leading strategic planning practices with clear education examples • Introduce a governance structure for creating and eventually monitoring strategic plan • Co-design stakeholder engagement activities • Review and analyze district data and current district initiatives 	<ul style="list-style-type: none"> • Identify previous plans, processes and beliefs on strategic planning • Select team members and activate teams • Prepare to execute on stakeholder engagement activities • Identify and bring district data to discussion and workshops 	<ul style="list-style-type: none"> • Project Overview Document with roadmap and team members • Stakeholder Engagement Plan • Executive Summaries to include regular briefs on the purpose, highlights, insights, and resources from onsite engagements and deliverables. Summaries will be updated and communicated to the project team after each phase of work and written so as to be turnkeyed to key stakeholder groups.

TOUCHPOINTS	TIMELINE
<ul style="list-style-type: none"> ● Support Calls: Regular support calls with project lead(s) to oversee, plan and support project implementation based on district needs and progress. 	<ul style="list-style-type: none"> ● 2 x 1 hr Bi-weekly Calls (Project Team)
<ul style="list-style-type: none"> ● Virtual Kickoff: Design and deliver a 90 minute kickoff meeting to work through the above objectives and align on stakeholder engagement plan. 	<ul style="list-style-type: none"> ● 90 min Virtual Session (Project or Steering Team)

Foundations

~6 Weeks

Engage with stakeholders to assess strengths and capabilities while identifying opportunities for growth

EDUCATION ELEMENTS ACTIVITIES	DISTRICT ACTIVITIES	DELIVERABLES
<ul style="list-style-type: none"> ● Design and deliver stakeholder engagement events (focus groups or forums) ● Analyze stakeholder engagement data and annual district data ● Review all stakeholder engagement data + model analysis and summarization for district ● Facilitate visioning for the future of district for students and schools; highlight focus areas for community input ● Facilitate the development of the Portrait of a Graduate 	<ul style="list-style-type: none"> ● Promote execute Stakeholder Engagement Plan ● Promote participation in the community survey ● Participate in visioning and Portrait of a Graduate workshops ● Provide community updates on progress 	<ul style="list-style-type: none"> ● Strategic Direction [such as Mission, Vision, Values ● Stakeholder engagement readout ● Draft Portrait of a Graduate ● Draft Strategic Direction ● Foundations Phase Executive Summary

TOUCHPOINTS	TIMELINE
<ul style="list-style-type: none"> ● Support Calls: Regular support calls with project lead(s) to oversee, plan and support project implementation based on district needs and progress. 	<ul style="list-style-type: none"> ● 2 x 1 hr Bi-weekly Calls (Project Team)
<ul style="list-style-type: none"> ● Stakeholder Engagement Events: Education Elements will provide a general survey template to engage in broad feedback while also co-leading 4 stakeholder events in the form of focus groups, forums or empathy interviews as determined by the steering team. Events will include hybrid options for virtual participation. 	<ul style="list-style-type: none"> ● 4 x 2 hr In-Person Events (Attendees TBD)
<ul style="list-style-type: none"> ● Strategy 1 - Virtual Stakeholder Engagement Feedback: Education Elements will lead the Steering Team through a review of the stakeholder engagement data to determine trends + focus areas for further exploration and ideation. 	<ul style="list-style-type: none"> ● 90 min Virtual Session (Steering Team)
<ul style="list-style-type: none"> ● Working Session 1: Visioning + Portrait of a Graduate: Education Elements will lead the Steering team through a series of protocols to draft the district's portrait of a graduate and review the district's current mission, vision, and values to determine if they are aligned to the stakeholder engagement data. 	<ul style="list-style-type: none"> ● 1 day In-Person Workshop (Steering Team)
<ul style="list-style-type: none"> ● Strategy 2 - Strategic Direction + Portrait of a Graduate Review - Education Elements will provide a readout of the work done in the Visioning + Portrait of a Graduate Working for review and feedback with the goal of finalizing before the Design Phase. 	<ul style="list-style-type: none"> ● 90 min Virtual Session (Steering Team)

Design

~4 Weeks

Define a vision and set of initiatives that prioritizes what matters most to your community and create a plan to communicate.

EDUCATION ELEMENTS ACTIVITIES	DISTRICT ACTIVITIES	DELIVERABLES
<ul style="list-style-type: none"> Facilitate Planning Team design workshops to develop a concrete list of goals and initiatives Support Steering Team in prioritization of ideas and recommendations Develop an actionable timeline and implementation plan (internal for district staff) 	<ul style="list-style-type: none"> Assemble planning teams (identified during Plan + Align phase) to participate in design challenges based on district focus areas Identify metrics for monitoring and growth Provide community updates on progress 	<ul style="list-style-type: none"> Finalized Portrait of a Graduate Finalized Strategic Direction Draft timeline and implementation plan Design Phase Executive Summary
TOUCHPOINTS		TIMELINE
<ul style="list-style-type: none"> Support Calls Regular support calls with project lead(s) to oversee, plan and support project implementation based on district needs and progress. 		<ul style="list-style-type: none"> 4 x 1 hr Bi-Weekly Calls (Project Team)
<ul style="list-style-type: none"> In-Person Design with Planning Teams to develop initiatives prototypes aligned to areas of focus. The team will also draft initial success metrics for initiatives. 		<ul style="list-style-type: none"> 2 days Design Workshops (Planning Teams- structure to be determined with Steering Team)
<ul style="list-style-type: none"> Strategy 3 - Initiative Prioritization + Planning - The team will prioritize key initiatives, objectives and key results based on work of the Planning Teams. 		<ul style="list-style-type: none"> 1 x 2 hr Virtual Session (Steering Team)

Launch

~6 Weeks

*Define a vision and set of initiatives that prioritizes what matters most to your community and create a plan to communicate.
Prepare for implementation by establishing best practices for progress monitoring*

EDUCATION ELEMENTS ACTIVITIES	DISTRICT ACTIVITIES	DELIVERABLES
<ul style="list-style-type: none"> Finalize initiatives, programs, and metrics Lead content creation and design process for external summary document Design external messaging for board of education and community Model progress monitoring process, with the goal of enabling the district team to lead meetings on their own 	<ul style="list-style-type: none"> Provide input on content and design for professionally-designed external summary document Provide opportunities for community to provide feedback and update them on progress Communicate Strategic Plan Assemble team and begin to lead progress monitoring meetings 	<ul style="list-style-type: none"> Professionally-designed marketing collateral that includes <ul style="list-style-type: none"> Visioning Statement(s) Portrait of a Graduate Strategic Priorities and metrics for monitoring and growth Process Summary Final Presentation Internal planning documents / process to support progress monitoring Sprint Plan #1 Launch Phase Executive Summary

TOUCHPOINTS	TIMELINE
<ul style="list-style-type: none"> ● Support Calls Regular support calls with project lead(s) to oversee, plan and support project implementation based on district needs and progress. 	<ul style="list-style-type: none"> ● 2 x Bi-weekly calls
<ul style="list-style-type: none"> ● Strategy 4 - Communication Planning - The team will finalize content of the strategic plan, provide feedback for design styles and preferences, and develop initial communication strategy. 	<ul style="list-style-type: none"> ● 1 x 2 hr Virtual Session (Steering Team)
<ul style="list-style-type: none"> ● Design Review Cycles - 2 cycles of design review (including written feedback) to develop professionally-designed marketing collateral. 	<ul style="list-style-type: none"> ● 2 x Virtual Design Consultations

Project Governance

At Education Elements we believe who you engage and how you engage people says more about your values than your plan ever will. To develop a responsive plan, we recommend incorporating all stakeholders into a feedback loop. This feedback loop serves to generate ideas, present proposals and catalyze change. Teams engaged with this loop are also encouraged to collaborate actively and dynamically. As a result, we believe that the strategic planning process becomes a new way of operating within an organization versus a document that sits on a shelf.

Education Elements has created a governance structure for this project that ensures clear roles, diverse voices, deep collaboration, and strong project management. We recommend that the district identify team members to serve in the roles listed in the graphic below to ensure optimal engagement and effective communication.

- **Project Sponsor** - Approves project roadmap and goals, signs off on major deliverables, participates in Strategic Planning Steering Committee (1 District Leader).
- **Project Team** - Manages project planning, logistics, and communications, participates in the Strategic Planning Steering Committee (up to 4 District or School Leaders).
- **Steering Team** - Committee of district, school, student, family, and community representatives who design and refine major deliverables. (up to 15 people)
- **Planning Team** - Committee of district, school, student, family, and community representatives who support community engagement and provide recommendations to the Steering Team. (no more than 30 people)
- **Advisors** - Individuals who provide context, perspective, feedback and ideas. (number varies)

We believe these layers of the loop are important considerations but you may find your district has different needs. A small or medium-sized district might find that some layers are repetitive while larger districts may require additional layers to include more stakeholders. We will align on the appropriate teams for your district during our Plan + Align phase.

PROJECT TEAM

ALTERNATE NAMES:
Project Leads, Logistics Team

PURPOSE

Drive completion of work. This team synthesizes and edits the process and plan throughout. These individuals are part of the Steering Team and have additional responsibilities between steering team meetings.

CONSIDERATIONS

- No more than 4 people (including organizational leader).
- Have significant time and resources to dedicate to strategic planning process.
- Highly organized and detail-oriented.
- High comfort facilitating large groups.

PLANNING TEAM(S)

ALTERNATE NAMES:
Design Teams, Working Groups,
Specialist Teams, Department Councils

PURPOSE

This leadership group will play an important role in engaging stakeholders, communicating the strategic plan, giving and receiving feedback. Individuals in this group might be divided into teams based on topics, priorities or interests to engage the community and reach more stakeholders. This group will guide and drive strategic planning and make the first line of decisions that will be validated by the steering team.

CONSIDERATIONS

- No more than 25-30 people.
- This team will be crucial to creating and recommending priorities or initiatives within the plan.



STEERING TEAM

ALTERNATE NAMES:
Core Team, District Council

PURPOSE

Decision-making body made up of representatives of your district. It is inclusive of different backgrounds, roles, and tenures. This team's role is to synthesize and deliver the action items outlined in your strategic plan. Throughout the creation of this plan, this team will be tasked with oversight of the process to ensure it aligns with the needs of various stakeholders.

CONSIDERATIONS

- No more than 15 people.
- This team should represent multiple stakeholders: parents, community leaders, school leaders, district staff, teachers.
- Consider inviting a board member to join your team.

ADVISORS

ALTERNATE NAMES:
Consultative Teams, Focus Groups

PURPOSE

This group of people will serve in a consultative capacity. They will help inform the strategic planning process in order for the planning and steering teams to make representative decisions. This group is more dynamic than the other teams; a district might bring different individuals into the process as needed. The time commitment would be less than the other groups.

CONSIDERATIONS

- Number of participants will vary.
- This group will provide context, perspective, feedback and ideas.

Pricing

The price for the services outlined is **\$125,000**. Our services costs are calculated as a fixed fee and are all inclusive including all time, travel costs, content creation, and delivery.