

Proposal Consulting Services for Strategic Planning

Submitted to the
Mountain View Whisman School District

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by



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Proposal

I. Background

In the fall of 2015, the Mountain View Whisman School District (MVWSD) began an intensive process of school and district quality reviews, in addition to gathering extensive stakeholder engagement as part of the superintendent's 100-day plan. This culminated with multiple stakeholder sessions in the spring of 2016 to take the findings of the current state of the district and begin building the ideal state, including the vision for MVWSD as well as the Profile of a Graduate. A group of parents, students, teachers, administrators, staff members, Board of Trustees, community members, nonprofit and business representatives participated in strategic planning sessions to craft the key elements of a strategic plan covering the period from 2016 to 2021.

MVWSD is interested in leveraging the existing strategic plan to enhance the work of the district for the next five years. The current mission, vision, values and beliefs, and profile of a graduate are not expected to change. Through the current strategic plan, the district has successfully implemented a number of initiatives that have resulted in a sound infrastructure and instructional program. This will provide a solid foundation to further accelerate student achievement through the next strategic plan.

II. Description of Firm

Greenway Strategy Group, LLC (GSG) is a woman-owned small business launched in 2012. We have provided strategy consulting on a consistent basis since that time, including strategic planning, program evaluation, and organizational improvement. GSG includes a team of eleven consultants working from remote locations, who form project-centric teams that best meet the needs of each client. Our remote structure allows us to work flexibly in high-functioning teams while keeping our costs low – ensuring the greatest value for our clients. Our consultants are located in Georgia, Florida, and California.

The mission of GSG is to create measurable growth and improvement in social impact organizations with a focus in the education and nonprofit fields. GSG considers each assignment with a fresh approach, customizing our tools and processes to match the client's existing knowledge, resources, culture, and desired results. Our strength lies in assisting organizations to analyze and synthesize information in order to design innovative solutions to complex problems. GSG utilizes an inclusive, collaborative approach to strategy development that builds capacity of organizations to implement meaningful change. We believe in capitalizing on the assets within organizations, rather than providing all the "answers" from external experts. Our previous experience, professional expertise and national networks allow us to inform strategy development by presenting effective practices for consideration. However, in order for strategic change to be fully implemented, those who do the work must be part of the design. Strategic plans do not improve outcomes. Changing behaviors of those in the system improves outcomes. In order to change behaviors, people must be involved in and understand the need for change and the merits of new ways of doing business.

GSG consultants bring decades of applied strategy experience in large, complex organizations in the government, education, nonprofit and corporate sectors including Dell, IBM, Turner, the National Park Service, the United Way of America, and several large school districts. We bring a combination of stellar coaching and facilitation skills married with expertise in quantitative and qualitative analysis.

GSG offers several unique elements in our strategic planning approach.

- We orient strategic plans toward a set of priority outcomes that represent the greatest opportunities to improve and enhance results for those served by the organization.
- We conduct objective analysis of the organization’s past performance and environmental landscape, and synthesize the results into key findings with implications for the future.
- We engage all stakeholders to ensure all perspectives are considered.
- We utilize those within the organization in the strategic plan design through structured facilitative techniques that ensure all voices are heard while building consensus.
- We provide proven tools and techniques, and coach and support internal teams to design the strategic plan framework and initiatives, which ensures ownership for implementation. We leave the organization with the ability to utilize these tools and techniques to manage and enhance the strategic plan over time.

III. Related Experience

Our clients include school districts; state education agencies; public, private and charter schools; universities; community colleges; nonprofit organizations; foundations and community collaborations. GSG has extensive experience working with public education organizations to develop and implement strategic plans. Several recent public education clients and projects are listed below.

Organization	Project
Boulder Valley School District, Colorado	Strategic planning consultation
Douglas County Schools, Colorado	Strategic planning consultation, strategic plan communication branding and messaging
Georgia Department of Education	Program evaluation of a National Science Foundation grant, CS4Georgia, designed to increase participation of under-represented students in computer science coursework
Lawrence Public Schools, Kansas	Strategic planning consultation
Kansas City, Kansas Public Schools	Strategic planning consultation
Marietta City Schools, Georgia	Strategic plan implementation, design of aligned employee performance management systems
North Dakota Department of Public Instruction	Business process review and improvement, strategic planning consultation, statewide education strategy integration
Palm Beach County Schools, Florida	Strategic planning consultation, process improvement
Pittsburgh Public Schools, Pennsylvania	Strategic planning consultation, strategic plan refresh utilizing design teams with community partners
Saint Paul Public Schools, Minnesota	Strategic planning consultation, program review and budget alignment
Union County Schools, North Carolina	Strategic planning consultation

Examples of strategic planning documents from our clients can be found at the following links. The links from Palm Beach and Saint Paul also include greater detail on implementation plans and progress reports to the community.

Organization	The School District of Palm Beach County Palm Beach, Florida
Strategic Plan Link	https://www.palmbeachschools.org/cms/one.aspx?pageId=11259075
Organization	Saint Paul Public Schools Saint Paul, Minnesota
Strategic Plan Link	https://www.spps.org/domain/14092

Organization	Douglas County School District Castle Rock, Colorado
Strategic Plan Link	https://www.dcsdstrategicplan.org/
Organization	Boulder Valley School District Boulder, Colorado
Strategic Plan Link	https://www.bvsvd.org/about/strategic-plan

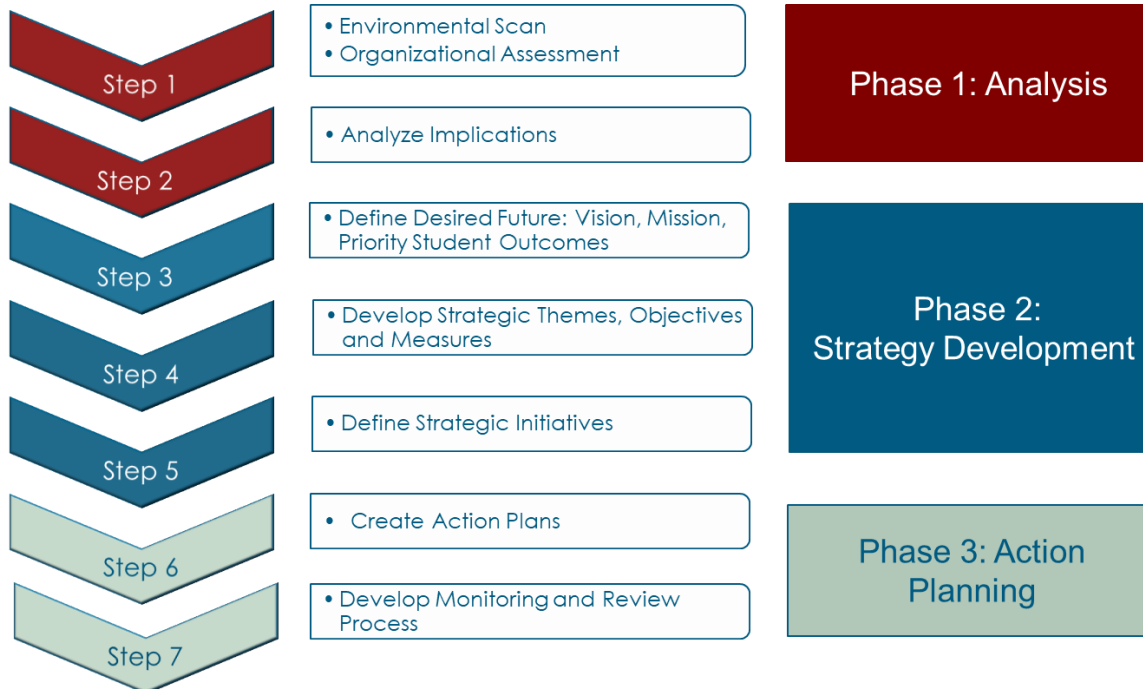
Additionally, GSG has led several comprehensive projects related to the work of public education, including the following:

- *Georgia Tech College of Engineering, the largest engineering college in the United States*
 - GSG led the design of a new strategic plan, working collaboratively with an internal district leadership. This project included extensive stakeholder engagement including student focus groups, facilitated town hall sessions, and interviews with university and national leaders.
- *Achieve Palm Beach County, a county-wide initiative to support students to enroll, persist and complete a post-secondary credential through collaboration among business, government, nonprofit providers, faith communities, civic organizations, K-12 education, universities, and community colleges*
 - GSG supported the members of the collaboration in developing a strategic plan based upon extensive student and parent input, focus groups with high school counselors and college advisors, analysis of student data, and profiling of existing community efforts. GSG also supported design of the initiative governance structure and action teams to implement initial projects. GSG recently completed a refresh of the original strategic plan, utilizing broad community collaboration, and engaging community leaders such as the school district superintendent, community college president, university president, United Way CEO, and several foundation and corporate leaders.
- *The Community Foundation for Greater Atlanta and the Joseph B. Whitehead Foundation*
 - GSG conducted extensive research and developed a five-year strategy to improve post-secondary access and completion among Atlanta Public Schools students who are low-income and the first generation to attend college. The resulting strategy was funded with a \$50 million foundation investment. During this effort, GSG engaged students, counselors, school district representatives, college representatives and community service providers. Additionally, GSG profiled effective college access and completion projects across the United States. Following approval and funding of the proposed strategy, GSG was contracted to support the implementation of Achieve Atlanta, a new nonprofit organization designed to implement the project recommendations.
- *The Wallace Foundation's Principal Pipeline Initiative*
 - GSG served as the Principal Professional Learning Community coordinator for this multi-year effort, designed to leverage the practices of principals who were effective in developing future leaders. GSG engaged 60 high-performing principals from six urban school districts in professional learning and design of leadership development tools. Participating school districts included Charlotte/Mecklenburg, Denver, Hillsborough, Gwinnett County, New York City, and Prince William County.

IV. Scope of Work

A. Approach

We will provide MVWSD expert design, guidance and facilitation of the strategic planning process. In order to ensure that the district builds the capacity and ownership for implementation of the strategic plan, we will support district leaders to fully engage in the process utilizing our tested approaches, and will involve all stakeholders including students, parents, teachers, union leaders, administrators, staff, community leaders and members. This work will result in a strategic direction for the district that focuses on a core set of measurable, priority student outcomes. Our unique, tested approach to strategic planning is outlined in the following graphic. We provide specific tools and techniques for each step of the process.



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During the **Analysis Phase** we will review progress on the last strategic plan, and key performance indicators. Using data provided by the district, we will analyze performance trends among student groups – deepening our analysis to understand root causes where indicated. We will also review existing data on student behavior and engagement, stakeholder perception surveys, staffing trends, and other relevant information. Where possible, we will benchmark district performance with comparable school districts.

We will conduct an environmental scan to seek to understand the external factors affecting the district. This will include interviews with community leaders and potential partners, as well as a review of the trends and innovations that will influence the school district in the future in the political, economic, social and technical arenas. We will also review current partnerships and opportunities for future partnership expansion.

The Analysis Phase will include gathering perceptions on current assets and future opportunities from students, parents, district staff, board members, general community members, and partners. In addition to considering opportunities for improvement, it is essential to understand what is working well, and the unique district characteristics that have led to past success so that these can be protected and fostered in the future strategic plan.

We may utilize a combination of surveys, interviews, focus groups, and community input sessions to solicit stakeholder input. Given the current environment and concerns regarding large groups gathering in

person, we will utilize a variety of virtual tools to facilitate stakeholder engagement. GSG has the skills and technology resources to conduct online surveys, virtual focus groups, online crowd-sourcing and prioritizing of ideas, and virtual team facilitation. We will review all input from stakeholders, code and categorize all comments, and prepare an in-depth report that identifies common ideas in aggregate as well as among specific stakeholder groups.

During the **Strategy Development** phase, we will facilitate design sessions with the district leadership to review the results of the Analysis Phase, further refining the implications. Using proven interactive protocols, GSG will engage the leadership to determine a set of priority student outcomes to achieve in the future reflecting opportunities for student growth, stakeholder needs and interests, and alignment with the district's Profile of a Graduate. We believe that school districts should drive strategy toward student outcomes – resulting in improvements in student knowledge, skills, behaviors and conditions.

Based upon these desired outcomes, our facilitative process will lead the district leadership to define the “strategic themes” or areas where the work *within* the organization must be developed, redesigned or expanded in order to achieve the student outcomes.

The components designed during the Strategy Development phase can be summarized using a one-page strategic plan framework that easily communicates the strategy for internal and external audiences. We will assist the district in testing an initial draft of the strategic plan framework through a brief stakeholder survey. Following the testing with community stakeholders, we will synthesize the stakeholder input and support the district leadership in making adjustments to the strategic plan framework.

In the final step of the Strategy Development Phase we will facilitate Strategy Teams to conduct research on innovative and effective approaches within each strategic theme (including effective approaches already deployed in the school district), and create a set of specific, measurable objectives and aligned strategic initiatives to guide the work of the district over the next five years. GSG will train the leaders of these teams and coach team members through the process in a series of virtual workshops. Additionally, GSG will utilize our extensive Knowledge Bank of effective educational programs and practices to provide practical examples for the teams' consideration in identifying potential strategic initiatives.

In the **Action Planning** phase, we will assist the district leadership team in phasing the strategic initiative implementation, so that all initiatives will launch over a three-year period and be fully implemented within five years. Strategic initiatives are designed to bring about transformative change rather than incremental improvements. Our experience has shown that implementing too many strategic initiatives simultaneously leads to baby steps in a myriad of directions without significant progress. To achieve priority student outcomes, strategic initiatives must be properly resourced, managed, monitored and adjusted. Therefore, implementation needs to be phased over time.

Following board approval of the strategic plan components, we will support Strategic Initiative owners to develop detailed action plans for those initiatives in Phase 1 (those to launch first.) These will include plans for stakeholder engagement, action steps, timelines, performance indicators, resource requirements, and risk assessment.

Finally, we will develop strategic plan performance measures and monitoring processes.

B. Workplan

The project engagement will begin with a project kick-off meeting. During this meeting, the tasks and timelines will be refined, keeping in mind the district's ongoing work and calendar. GSG will assign a project leader who will work with the district's project coordinator to develop a detailed project plan including key dates and tasks. This plan will be reviewed and updated during bi-weekly project calls to anticipate and plan for next steps, and ensure the project is on track. The project leader will also facilitate updates and work sessions with the district leadership, and make presentations to the board at appropriate intervals.

Following is a potential project workplan and timeline. While this timeline represents the cadence of the project, the exact timeline will be adjusted based upon the district's specific needs and interests.

Task	Timeline
1. Virtual meeting with district leadership for introductions and project planning	September
Phase 1: Analysis	
2. Interviews, virtual focus groups, surveys with key stakeholders to identify assets and opportunities	September
3. Review progress on current strategic plan, existing stakeholder surveys and other input, student performance, other key indicators, other background documents	September
4. Conduct an environmental scan including an assessment of local, state and national trends; performance indicators and innovations of similar school districts; and opportunities for collaboration in the community	September
5. Prepare presentation of Analysis Phase findings	September
6. Present findings to district leadership, discuss strengths, weaknesses, opportunities and threats (SWOT); consider potential priority student outcomes for improvement and strategic themes to focus future strategic efforts	September
Phase 2: Strategy Development	
7. Present Analysis Phase findings, draft priority student outcomes and strategic themes to School Board	October 1
8. Survey for stakeholder feedback on draft priority student outcomes and strategic themes	October
9. Review and synthesize stakeholder input	October
10. Facilitate district leadership to review stakeholder input and make revisions to priority student outcomes and strategic themes	October
11. Meet with leadership team - identify Strategy Team leaders and members to develop objectives and strategic initiatives within each strategic theme	October
12. Train Strategy Team leaders and orient team members	October
13. Provide remote coaching and support to Strategy Teams in developing objectives and identifying strategic initiatives that will lead to improvement in strategic themes	October/ November
Phase 3: Action Planning	
14. Facilitate senior leadership team to approve and develop phased implementation of strategic initiatives	November
15. Present strategic plan framework (priority student outcomes, strategic themes, objectives, strategic initiatives, initiative implementation phases) to Board for approval	November 19
16. Provide remote coaching and support to Strategic Initiative Owners on the design of action plans for Phase 1 strategic initiatives, to include scope, stakeholder engagement plans, detailed workplans and timelines, performance indicators, resource requirements, and risk analysis	November- January
17. Facilitate senior leadership to approve Phase 1 strategic initiative action plans including resource allocations	January
18. Support district staff in developing a Strategy Scorecard to measure progress on priority student outcomes and objectives, including baseline performance indicators and targets where available	January
19. Develop reporting and monitoring processes for strategic initiative implementation	January

V. **Project Team**

Martha Taylor Greenway will serve as the project leader, working with the superintendent and designated project coordinator to set project direction and supervise the strategic planning process. Martha brings over 30 years of experience in strategy and performance management in the education and nonprofit sectors.

Over a 13-year period, Martha served numerous roles, most recently as Deputy Superintendent, with Fulton County Schools – a Georgia school system of 95,000 students in urban, suburban and rural communities, which surrounds, but is separate from the City of Atlanta. Her responsibilities covered diverse areas including research, student assessment, strategy and innovation, policy and legislative relations, communications, technology, human resources, charter schools, school attendance zone redistricting, and the education foundation.

Martha led the first implementations of the Balanced Scorecard in both the nonprofit sector and K-12 education. The school system implementation was honored with the Balanced Scorecard Hall of Fame and is documented in a case study by the Harvard Business School.

Martha also worked extensively with the United Way system, in two local communities and as Vice President of Planning and Policy at the national organization. While with United Way of America, she managed the development of the United Way's first national strategic plan and reorganization of the governance structure; oversaw the national market research program; and led the development of a manual and training model for local, nonprofit organizations to measure results, *Measuring Program Outcomes: A Practical Approach*, which is still widely used. This program was awarded the American Society of Public Administration's Organizational Leadership Award.

Martha's work has been featured in *Education Week*, *Digital Directions*, *The Chronicle of Philanthropy*, the book *Strategy Maps* by Robert Kaplan and David Norton, and several other books and journal articles. Martha holds a Master's of Public Administration and a Master's of Social Work, both from the Ohio State University where she was a Graduate Fellow. She is a graduate of the Vanderbilt Superintendents Institute, and Leadership America. Martha is active in the community, currently serving as the Vice Chair of one of the premier providers of early learning in the United States, Sheltering Arms – a regional child development program.

Erika Cooper will serve as a strategic planning coach, and provide guidance on areas of the strategic plan addressing curriculum and instruction. Erika has supported strategic planning for Douglas County Schools, Saint Paul Public Schools, Pittsburgh Public Schools, and several nonprofit clients.

Erika has an extensive background as a public education leader, educator, and nonprofit manager. She is currently a fourth-year Ph.D. student at the University of Georgia. As a mixed methodologist, she uses both qualitative and quantitative approaches to understand the ways in which education policy impacts educational equity. Erika's current research is concerned with both non-white and low-income families' perceptions of traditional public schools and how those groups navigate school choice decisions. Her theoretical lens marries Tara Yosso's cultural wealth model with critical race theory to best offer ways in which to capitalize on the competencies of vulnerable students, rather than focusing on their deficits. Erika believes that highlighting strengths empowers students to increase self-efficacy and heightens their chances of achieving long-term success.

Previously, Erika was a practicing educator who spent about thirteen years as a teacher, school level administrator, central office administrator, and non-profit leader. A large portion of Erika's teaching experience was in majority African American and/or majority low-income schools. These experiences, coupled with her own upbringing in low-income neighborhoods, fostered a unique approach to vulnerable students. A champion of the whole child approach to teaching and learning, Erika is keenly aware that students do not exist in a school-vacuum. Instead, they bring all of their experiences with them. When those experiences are acknowledged and addressed, students can better engage in the learning environment. However, when those unique needs are not considered or dealt with, vulnerable students have decreased opportunities for success.

Most recently, Erika worked with a large, urban school district to increase school flexibility and innovation, and improve talent development. In previous education roles she worked as a high school teacher and administrator. In the nonprofit sector, Erika served as the program coordinator of a middle school mentoring program for at-risk girls, affiliated with the University of Virginia; and as a program director for an organization serving children with mothers in prison.

Erika is pursuing a Ph.D. in Education Administration and Policy at the University of Georgia, and holds a M.S. in Education and Social Policy from Northwestern University, and a B.A. in Economics from Spelman College.

Fran Cowart will serve as the research leader. Fran brings over ten years of experience in the research and evaluation field to Greenway Strategy Group. Fran is passionate about using data to drive effective decision making.

Previously, she held the position of Outcomes Measurement Manager at Girl Scouts of Greater Atlanta. She created, administered and analyzed surveys for over 36,000 girl participants and 17,000 adult leaders. She measured Girl Scout program effectiveness in programs such as girl leadership activities, the cookie program, camping program, and volunteer management. She communicated results with actionable recommendations. Fran also facilitated focus groups and synthesized and analyzed findings. In addition, Fran generated evaluation metrics for components of grant reporting.

Fran was also a researcher at the Southern Regional Education Board (SREB) in the school improvement department where she managed a national assessment and survey program for over 1,000 schools. She developed and administered surveys and analyzed local, state and national education data. She regularly led training sessions instructing teachers and school leaders on how to effectively use student and school data to drive change. While with SREB, Fran was an evaluator on a schoolwide literacy and mathematics instructional initiative. Her work was published in two books focusing on school leadership and effective principals.

VI. References

The following individuals can provide references for GSG’s strategic planning approach and consultation.

Organization	Pittsburgh Public Schools Pittsburgh, Pennsylvania
Client Name	Errika Fearby Jones, Chief of Staff
Email/Phone	ejones2@pghschools.org 412-529-3603
Organization	Saint Paul Public Schools Saint Paul, Minnesota
Client Name	Joe Gothard, Superintendent
Email	joe.gothard@spps.org 651-767-8152
Organization	The Douglas County School District Castle Rock, Colorado
Client Name	Marlena Gross-Taylor, Chief Academic Officer
Email/Phone	mgtaylor@dcsdk12.org (828) 455-3221

VII. Project Fees

All work outlined in this proposal will be performed for a fixed fee of \$61,650, payable at intervals aligned with the agreed project plan.

These costs are based upon the following parameters:

- The school district will provide a project coordinator for the strategic planning effort who will work with GSG to manage the strategic planning process.
- Stakeholder surveys will be made available online via the district website and other social media sites. If a district system is used to conduct the survey, the district will provide GSG with an electronic file of survey results.
- District staff will extract and compile all necessary data on student achievement and other key indicators from district student information systems. This scope of work does not include original data collection or analysis of student-level or employee-level data. If desired, such original data collection and analysis can be conducted for an additional fee.
- General community engagement forums (including virtual engagement opportunities) will be scheduled by district staff. If large-scale forums are conducted, district staff will support facilitation of breakout sessions with protocols designed by GSG, and organize the input electronically for analysis by GSG.
- Any focus groups, whether in person or virtual, will be organized and scheduled by the school district at a mutually agreeable time. The school district will issue all invitations to focus groups.
- The school district will provide introductions and contact information to GSG for any individuals to participate in interviews.
- This fee does not include reproduction or assembly of meeting materials. Electronic copies of any materials will be provided to staff for reproduction.
- This fee does not include professional graphic design or reproduction of a strategic plan publication.