



TO: Tim Hadfield
FROM: Rick Nobles
RE: Strategic Planning Proposal
DATE: October 6, 2014

Tim, I enjoyed our meeting, as always!

I've adapted this memo from the previous process memo I sent you some weeks ago. Based on our conversation, I think we are on the same page in terms of a project that blends the thinking of the district's leadership and Board, with a select group of staff members and community representatives to create a truly comprehensive, actionable document that has been developed through a very step-wise process. In doing so, each person has the chance to play an important role in the district's strategic thinking.

The steps in our process, with specific tactics and costs, are as follows:

- Leadership "deep dive"-- \$1,500

We begin with interviews with each member of the Board, along with you and the members of your Cabinet, to better understand each person's views on the current state of the district and where the district should be headed in the future.

- Research with key stakeholders -- \$17,300

The thoughts from the interviews would play a key part in research that we would conduct with key stakeholder groups, including current district parents, non-parent patrons/community leaders, and staff members. This would include:

- A telephone survey with 400 complete calls of randomly selected district patrons.
- Online surveys of district patrons and staff.
- Four focus groups strategically located and recruited to insure participation of patrons on the geographic and/or economic borderlines.

The results of this research will then drive the process that would be followed by a Strategic Planning Committee:

- Create a committee -- No fee

This committee should consist of your Cabinet, select Board members (who will be there in a “Subject Matter Expert” role only), staff members who typically like to engage in such deliberate work, and a cross-section of parents, community leaders and non-parent patrons.

Cabinet level folks are typically assigned to each of the various strategic plan category subgroups that have been identified through the research phase – although they will not be in a leadership role. They are there to offer counsel based on what they know about the district.

We will work with you to identify committee members as needed.

- Send out invitations to a launch meeting -- No fee

These invitations – for which we will provide content and counsel on how to distribute – will describe the purpose of the group, why the individuals were selected, and the time commitment that would be required. Contact information would be collected, and a survey would be sent to each person ahead of the first meeting. That survey would present the various subcommittee options (again, as identified through the research process), and would ask the potential committee member to identify his or her preferences. This process helps put people in a place where they are most comfortable and, therefore, can be most helpful.

- Conduct a series of four committee meetings--\$8,500

Meeting one would be an introductory session, where we explain the process, and what will be expected of the group. Subgroups will also get together to discuss preliminary strategies under their specific goal area (again, identified through the research).

Between meeting one and two, each subcommittee will gather to flesh out their strategy statements. At meeting two, they will present their information (in verbal and written form). Other subcommittees will have the chance to share their thoughts and questions.

Between meetings two and three, subcommittees are expected to provide written feedback on the strategies of the other subcommittees. (Sometimes, it’s more comfortable for people to do so in writing, rather than in person.) Once those have been collected by us, and provided to them, modifications to the strategies – if necessary – will be prepared by the subcommittees. The subcommittees are then expected to meet again – this time, to prepare tactics under each strategy.

Meeting three works like meeting two – presentation by the subcommittees, and thoughts and comments from others.

After meeting three, the subcommittees are expected to provide written feedback on the tactics of others. As with the strategies, that feedback will be collected by us, and provided to the subcommittees for action, if desired.

Meeting four is the review of the draft final document.

Total cost--\$27,300

This entire process takes several months, which is intentional. We believe it is important to let ideas “percolate,” so that the best, most actionable final plan is produced.

Tim, I hope these tactics and costs are in line with what we discussed. Please call me if you have any questions or comments.

We look forward to getting started!

DRAFT