



# Organizational Consulting

## Stakeholder-Driven Strategic Planning



WISCONSIN ASSOCIATION OF SCHOOL BOARDS

# Stakeholder- Driven Strategic Planning Meeting #1

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# Welcome

## Introductions

Opening remarks from Mike Toelle, Superintendent

Introduce yourself, your connection to the school district/community. Answer the question, “What is it that I want to achieve through this planning process?”

## Facilitator Introduction

Housekeeping

Breaks

Phones

Movement is good

Other needs of the participants



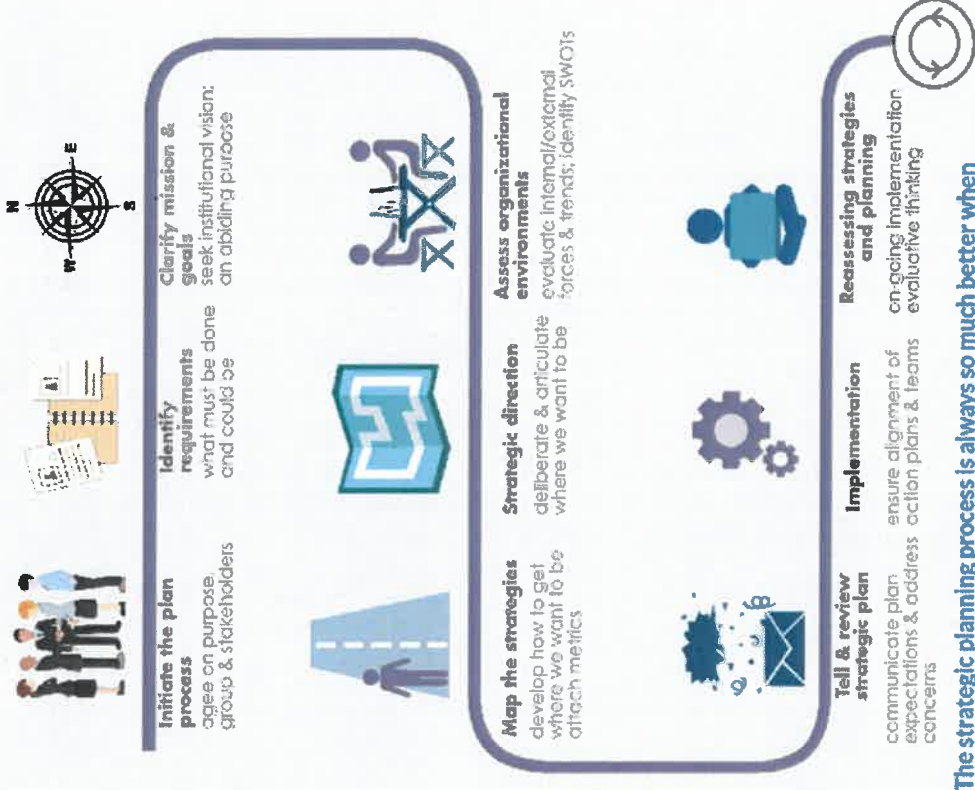
# The Stakeholder Driven Strategic Planning Process

- ▶ 4 to 5 meetings (length of the meeting to be driven by the work)
- ▶ Steering Committee
- ▶ External and internal analysis
  - SOAR (Strengths, Opportunities, Aspirations, and Results
  - Leadership analysis, Vision and Mission, and internal reviews
- ▶ Survey of the community
- ▶ Development of a plan document
- ▶ Board of Education – formal approval of the plan
- ▶ The work has just begun
  - Three year cycle
  - Develop the yearly action items
  - Monitoring by the board of education



# The Process of Strategic Planning

by Pam Schwind  
Success doesn't just happen, it's planned for.



Infographic of the process

The strategic planning process is always so much better when everyone is involved. The plan focuses equally on the 'what' (purpose, direction) and the 'how' (goals, strategies). - Al Brown

# District Information

» Presentation of Local Material

# District Presentation of Data

- ▶ The district will share important data
  - Schools
  - Achievement
  - Demographics
  - Finance
  - Etc.
  
- ▶ Share the District's Vision and Mission and the process that was used to develop the statements
  
- ▶ The goals is to create a common understanding of the facts and figures associated with the school district

# SOAR

»» Working in groups of four



# “What You Seek, You Find More Of”

Innovation Partners International

- ▶ Strengths, Opportunities, Aspirations and Results (SOAR)
  - *Replaces the traditional SWOT process*
  - *Leverage the positive*
  - *Focus on the potential: What is the vision?*
  
- ▶ Break into groups of 4 or current table
  - Choose a recorder, timekeeper, and communicator
  
- ▶ We will be reporting the results of the group



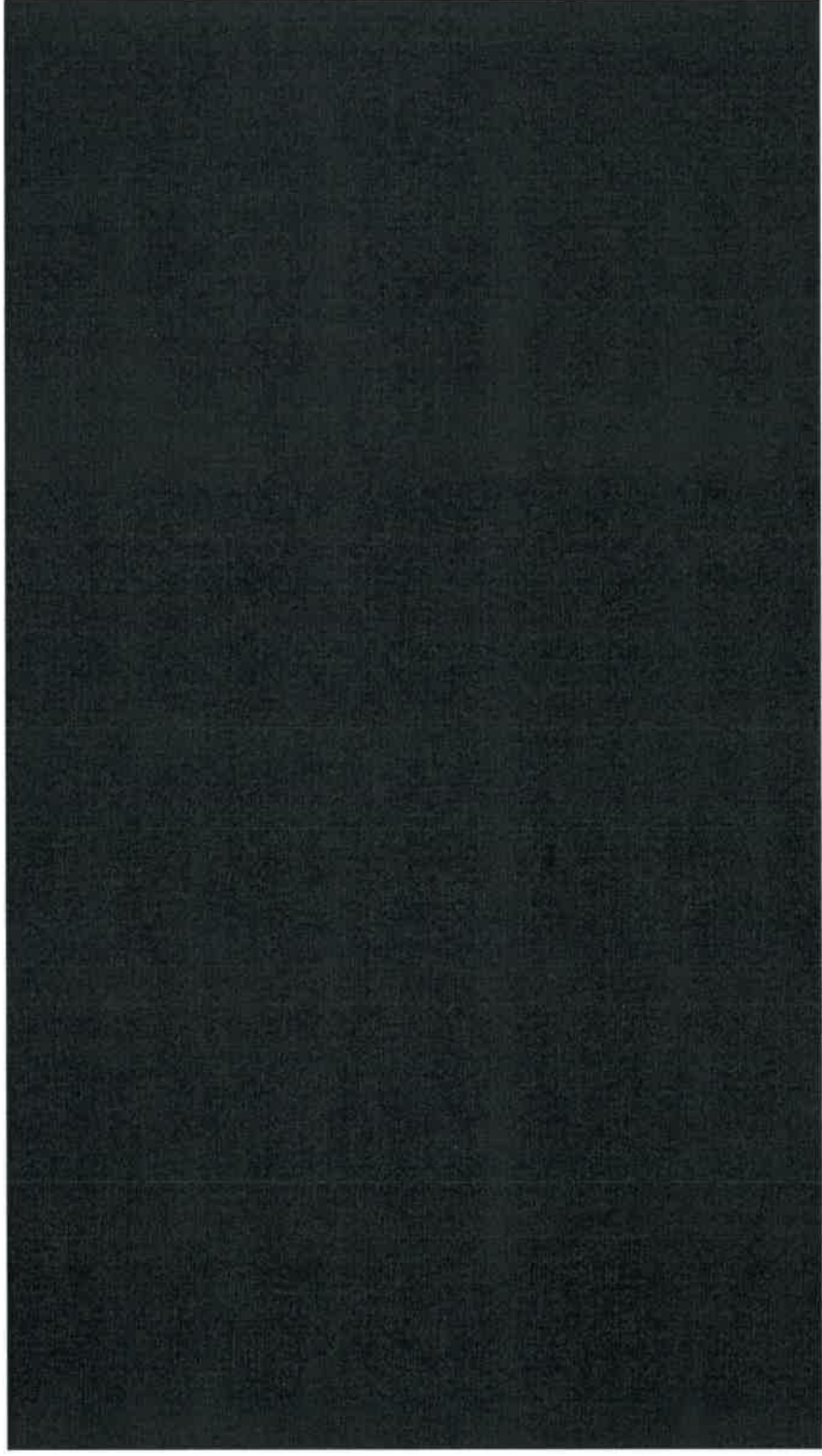
# Report to the Group

- ▶ What were the results of your discussion?
- ▶ Was there an “ah-ha” moment?
- ▶ Is there anything that struck you as significant?
- ▶ Tabulation of the results
- ▶ Comparison to the Vision and Mission of the school district
- ▶ In the future, this information will be compared to the survey results

# Vision

»» As we look to the future

# Writing a Vision Statement



# Is Your Vision Statement:

- ▶ **Current**
- ▶ **Reflective of current populations**  
(internal or external)
- ▶ **Futuristic**
- ▶ **Unique**



# Survey

» Seeking Public Input and  
Community Connections

# Introduction of the Survey

- ▶ Questions:
  - What are the greatest challenges or issues this school district has to address over the next five years in order to provide a quality education for all students?
  - What are the most important skill and abilities student need to know and 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?



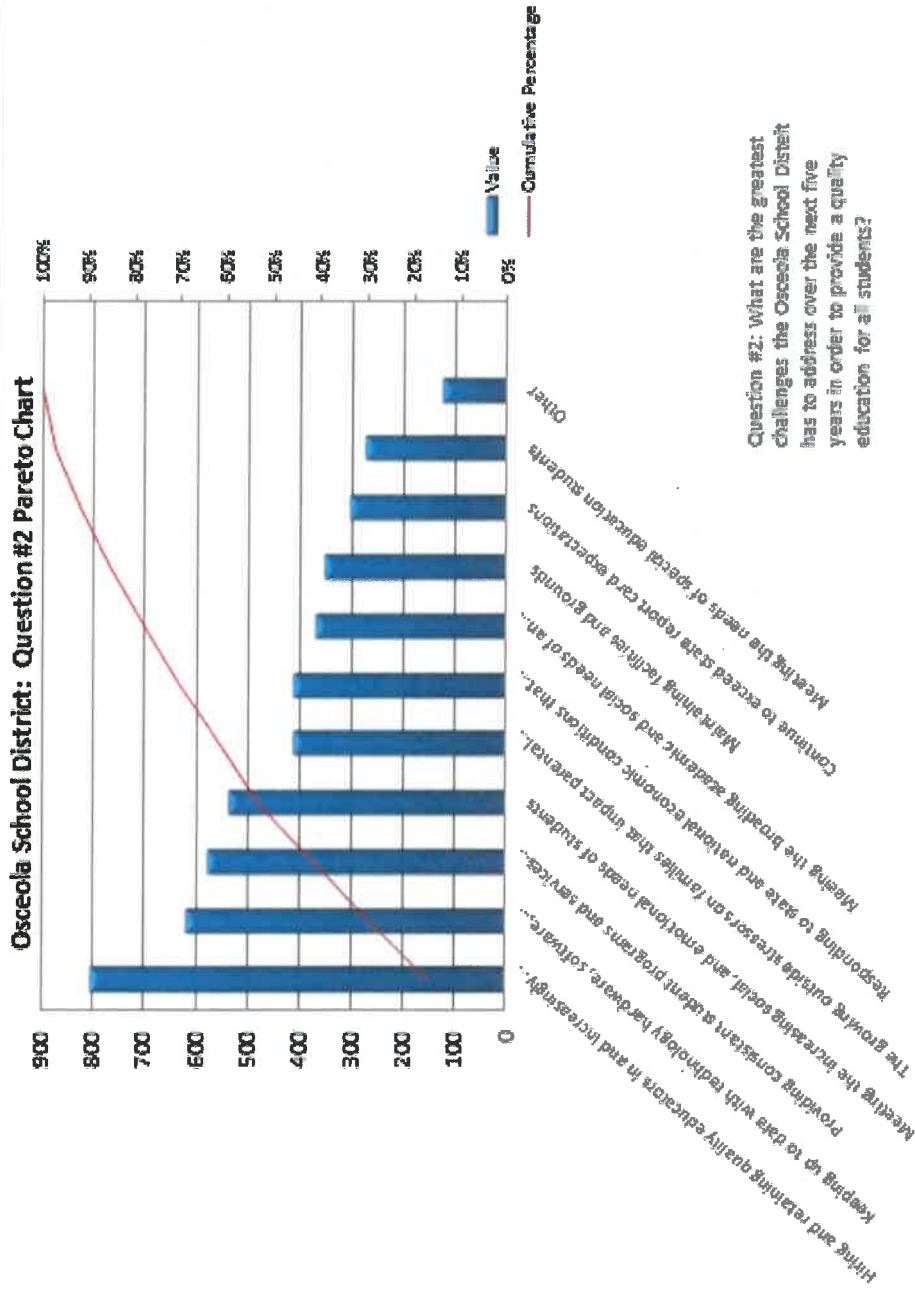
# Questions continued...

- What should the financial priorities be for our school district future 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 the make decisions about long-term priorities and goals?





# Pareto Analysis



Question #2: What are the greatest challenges the Osceola School District has to address over the next five years in order to provide a quality education for all students?



# Pareto Analysis cont.

- ▶ Dr. Joseph Juran developed the process and named it after Vilfredo Pareto and his work in uneven distribution.
- ▶ Pareto principle: 80 percent of an effect comes from 20 percent of the causes.
- ▶ 80/20 percentage identifies the “vital few” that will provide greater payoff than the “useful many” .



# Distribution/Collection/Analysis of the Survey Data

- ▶ **Distribution**
  - Format
  - Means
- ▶ **Collection**
  - Timeline
  - Collection points
  - Participation of the Steering Committee



# Next Meeting

- ▶ October 8th
- ▶ Publication of the Steering Committee work
  - Website
- ▶ Review of SOAR results in a Situational Analysis
- ▶ Progress report of community survey and distribution
  - Getting the best information
- ▶ School District Vision
- ▶ Feedback of tonight's meeting?
  - Exit survey

