



PROPOSAL FOR:

Portrait of a Graduate & Strategic Planning Services

PRESENTED TO: Covington Independent Public Schools, KY

Date: November 30, 2021

Battelle forKids

Realizing the power and
promise of 21st century
learning for every student

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EXECUTIVE SUMMARY

Every school system is unique, but they are connected by a shared aspiration: that all students have an educational experience preparing them to be effective lifelong learners and contributors.

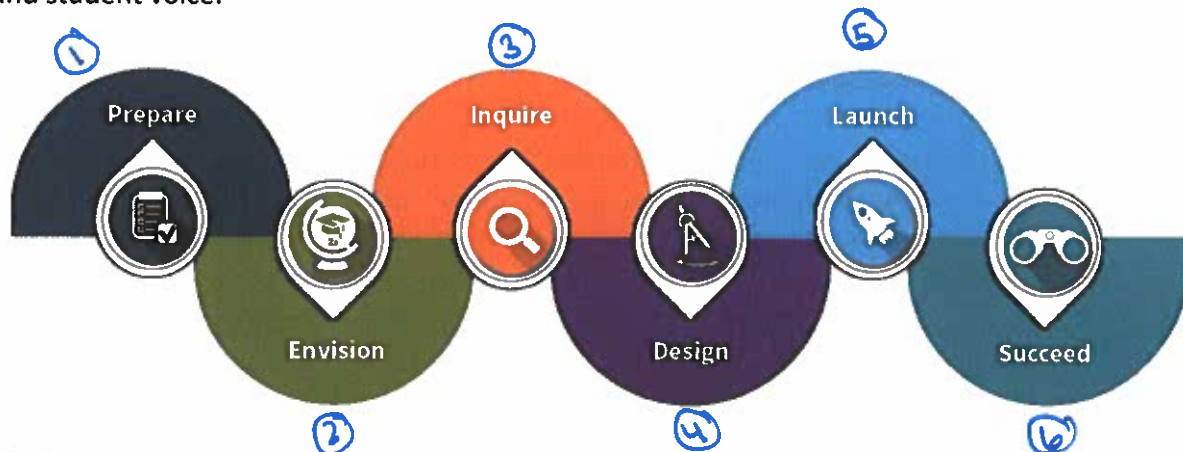
Now more than ever, that experience must not only provide for the acquisition of rigorous academic content, but it must also be more intentional about fostering critical thinking, communication, collaboration, creativity, and other 21st century skills our young people need to thrive in this complex, rapidly changing world.

Many school systems across the country have engaged the broader community in developing a strategic plan anchored by a collective vision that articulates the community's aspirations for its students in its Portrait of a Graduate.

Locally developed, but globally positioned, the Portrait of a Graduate serves as a North Star for system transformation. Providing strategic direction for the redesign of the overall educational experience for students, this collective vision reinvigorates and re-engages students, teachers, and community stakeholders by answering critical questions such as:

- What are the **hopes, aspirations, and dreams** that our community has for our young people?
- What are the **skills and habits of mind** that our children need for success in this rapidly changing and complex world?
- What are the **implications for the learning experiences** we provide in our school systems?

Battelle for Kids' strategic planning process is built around this central construct. The following proposal describes the six-phase process to develop a strategic plan that incorporates the development of a Portrait of a Graduate, is driven by community input, and elevates teacher and student voice.



STRATEGIC PLANNING

Phase 1: Prepare



Since a good beginning predicts a good ending, the Prepare phase is critical to the plan's success by ensuring thoughtful community engagement and elevating the voice of teachers and students. Battelle for Kids (BFK) will begin by facilitating a virtual **District Leadership Orientation Meeting**. During this meeting, BFK will review the district's expectations and conditions for success, clarifying how we will engage and discuss key considerations for the identification of Design Team members. The District Leadership Team will be responsible for shepherding the plan to success.

At the District Leadership Orientation meeting, BFK will also share the **Strategic Planning Communication Tools**, including letters of invitation to Design Team members, website and social media messaging and talking points for District Leadership Team for use with the board, Design Team, and other community members. Throughout the engagement BFK will provide phase appropriate communications for district leadership to use with internal and external stakeholders designed to keep the community up to date on their strategic planning efforts.



Following the District Leadership Orientation meeting and identification of Design Team members, BFK will deliver the **Project Charter**. Informed by the scope of work and orientation meeting, the charter will outline the strategic planning design process, including key messages, timing, and design team members.

Additionally, this phase initiates a series of monthly **Consultation and Capacity Building** phone calls that will run through the duration of our engagement, to ensure status alignment and build capacity of district leaders to guide the planning process through to ultimate success.

Note: All timelines can shift based on actual start date and ground-level realities.

Milestone/ Deliverable	Description	Est. Timeline
District Leadership Orientation Meeting	A virtual meeting designed to provide a thorough understanding of the strategic planning process to the District Leadership Team	January 2022
Prepare Phase Communications Tools	Resources for communicating with internal and external stakeholder groups during the Prepare phase	January 2022
Project Charter	A guiding document outlining the strategic planning design process	January 2022
Consultation and Capacity Building	Monthly phone call with BFK and the district to review the overall strategic direction of the engagement and build district capacity.	Monthly starting with Orientation

Phase 2: Envision – Portrait of a Graduate



The **Envision Phase** guides the development of a Portrait of a Graduate. This design process involves a sustained community conversation leading to a shared agreement on a unique community-owned picture of what graduates need for success. While every community and its school system are unique, the proposed four-meeting process below will guide this phase of developing your Portrait of a Graduate.

During **Portrait Design Team Meeting #1**, BFK will orient the Design Team through an overview of the Portrait process. During this meeting, Design Team members will discuss the overarching questions that guide the work. BFK will facilitate an in-depth examination on the landscape shifts that necessitate educational transformation.

During **Portrait Design Team Meeting #2**, BFK will facilitate discussion around what competencies young people need to address the changes in society identified in Design Team Meeting #1 and support the district in prioritizing these for the district's unique local context. Through a series of individual and group activities, the Design Team will begin to identify competencies for their Portrait.

The focus of **Portrait Design Team Meeting #3** is converging on a set of Portrait competencies and contextualizing competency descriptions. Design Team members will also share their creative inspiration to inform the graphic design of their Portrait visual.

During **Portrait Design Team Meeting #4**, BFK will present a draft designed Portrait with competencies and description statements. District Leadership will share any community feedback to augment the important work of the Portrait Design Team and to assist the team in finalizing the Portrait. The Design Team will discuss—through an activity facilitated by BFK—how to implement their Portrait and identify what success looks like.

To support the District Leadership Team throughout the Envision Phase, BFK will provide the **Communication Toolkit**, including meeting reminders, thank you letters, and sample messaging to the broader community around the development process and how this connects to the forthcoming phases.

Lastly, ongoing consultation will be provided through the monthly **Consultation and Capacity Building** phone calls.

Milestone/ Deliverable	Description	Est. Timeline
Portrait Design Team Meeting #1 [Possible Onsite]	Facilitation of a 2.5–3 hour meeting to kick off the Design Team work	February 2022
Portrait Design Team Meeting #2 [Possible Onsite]	Facilitation of a 2.5–3 hour meeting around necessary competencies	March 2022
Portrait Design Team Meeting #3 [Possible Onsite]	Facilitation of a 2.5–3 hour meeting to reach consensus on competencies, description statements, and visuals	April 2022
Portrait Design Team Meeting #4	Facilitation of a 2.5–3 hour virtual meeting to finalize the recommended Portrait and recommendations for how it can be actualized in the district	April - May 2022
Graphic Design Support of your Portrait	Battelle for Kids will present 2-3 sketch visuals designed with community input and 2 rounds of adaptations	March – April 2022
Communications Toolkit	Includes talking points, invitation to Design Team members, meeting reminders, community vetting survey questions, thank you emails, and sample messaging for board members and district staff.	Ongoing

Phase 3: Inquire



Once the vision for success is identified as the Portrait of a Graduate, the District Leadership Team closely reviews its current state. BFK will provide **Current State Analysis Support** by mining available qualitative and quantitative data such as student achievement data, attendance data, existing focus group and survey findings (family, student, staff, and community), policies, report cards, etc. At this point in the engagement, the Portrait Design Team becomes the Strategic Planning Design Team. BFK will work with the district to determine the Strategic Planning Design Team Planning and Meeting Process. This will include support in determining the number of meetings, topics, and structure.

BFK will facilitate **Strategic Design Team Meeting #1** to gather additional input from Design Team members on the district's current state. Framed by the district's analysis of its current state and by the envisioning process through Portrait of a Graduate, BFK will work with the

district leadership team to align on the gaps between current and desired future states. During this session a system self-assessment and SWOT analysis will occur. BFK will also work with the District Leadership Team to complete a self-assessment of its system.

Additionally, BFK will work with the district to produce an **Asset Inventory**, identifying potential internal and external assets that could be leveraged to drive systems transformation.

The **Current State Analysis Report** will summarize the findings from the district's SWOT Analysis, system self-assessment, and portrait implementation implications activity. The findings will guide the district's next steps and preview of considerations the district should address in the Launch Phase (managing change, building capacity, translating the Strategic Plan into learning and assessment frameworks, etc.).

The team will be supported with **communications tools** (including Strategic Design Team reminders, follow-up, and thank-you emails) and ongoing **Consultation and Capacity Building** phone calls.

Milestone/ Deliverable	Description	Est. Timeline
Strategic Design Team Meeting #1 [Possible Onsite]	BFK will co-facilitate a meeting to collect qualitative perception data from Strategic Design Team members. This will include a SWOT Analysis, 21 st Century System Self-Assessment, Portrait Implications discussion and an Asset Inventory.	May 2022
Current State Analysis Report	Summary report of the proceedings to guide the district into its next steps.	May –June 2022
Communications Tools	Resources for communicating with internal and external stakeholder groups including: <ul style="list-style-type: none"> • Invitations to join Strategic Design Team • Design Team Meeting reminders • Follow-up and thank-you emails 	Ongoing
Consultation and Capacity Building	Continued monthly phone calls with BFK to review the overall strategic direction of the engagement and build the district's capacity.	Ongoing

Phase 4: Design



The Design phase is focused on capturing input and reactions from key stakeholders to the strategic planning framework and to begin writing the plan.

As the district welcomes many voices and elicits ongoing input, people will see themselves as part of a movement toward a shared vision of the district's Portrait of a Graduate. This phase of the strategic planning process broadens the sources of input to the plan to transform the school system.

BFK will produce a draft **Strategic Planning Framework** for the district's review prior to community sharing. Based on the vision formed by the district's Portrait and the findings from the Current State Analysis Report, the Strategic Planning Framework encapsulates the district's proposed priority areas and suggests potential metrics and evidence of success and additional resources for the District Leadership Team to consider. This tool will help translate the priority areas into the goals and strategies for the district's Strategic Plan.

The priority areas of the Strategic Planning Framework will be vetted during **Strategic Design Team Meeting #2**. Then BFK will facilitate a virtual session with District Leadership to review feedback from the Strategic Design Team and identify goals, strategies, and metrics for each priority area. Additionally, BFK will share resources and prepare the district for writing its plan with **Strategic Plan Creation Consultation**. BFK will provide technical assistance and available resources, such as exemplar case studies from other districts, that will help District Leadership develop goals and strategies for each priority area. While the plan is being written, BFK and the District Leadership Team will have weekly hand-offs for comments and vetting.

To operationalize the Strategic Plan, BFK will also provide a year-to-year action planning template to link the strategies and metrics outlined in the Strategic Plan with tactical efforts. Key district and school leadership will use the action planning template to begin drafting content with staff responsible for executing work plans to activate the Strategic Plan while the District Leadership Team ensures alignment with the overarching framework.

Strategic Design Team Meeting #3 will provide an opportunity for the Strategic Design Team to share their reactions and feedback to the draft components of the Strategic Plan.

Continued counsel will be provided through the **Consultation and Capacity Building** phone calls throughout the writing process. The BFK team will work with the District Leadership Team to assess progress, work through any specific issues, accelerate the writing process, and check that the draft strategic plan follows the direction set by the district's Portrait of a Graduate.

Milestone/ Deliverable	Description	Est. Timeline
Strategic Planning Framework	Outlines the district's proposed priority areas, recommended metrics and evidence of success, and resources for developing goals and strategies.	June 2022
Strategic Design Team Meeting #2 [Possible Onsite]	A meeting with Strategic Design Team to vet the priority areas for strategic planning and to unpack strategic framework and feedback from Design Team and develop draft goals and strategies.	June 2022
BFK and Leadership Team (or subset) will trade iterations of the unfolding SP	Either BFK or Leadership Team will draft SP and the other group will vet. There will be weekly hand-offs over about a six-week period.	Weekly – June - July 2022

Strategic Plan Creation Consultation	Technical assistance and resources for scaling district transformation that will help District Leadership develop goals and strategies for each priority area.	Ongoing – July 2022
Strategic Design Team Meeting #3 [Possible Onsite]	A meeting with Strategic Design Team to vet draft components of the Strategic Plan.	July 2022
Strategic Plan Completion	Facilitator and District Leadership Team engage in the iteration process until the plan is complete and finalized.	August 2022
Consultation and Capacity Building	Continued monthly phone calls with BFK to review the overall strategic direction of the engagement and build the district's capacity.	Ongoing
Communications Tools	Resources for communicating with internal and external stakeholder groups including: <ul style="list-style-type: none"> • Design Team Meeting reminders • Follow-up and thank-you emails 	Ongoing

Phase 5: Launch



The Launch phase is the moment when the plan truly comes to life. Everyone involved in creating the strategic plan should be enlisted as an ambassador to help tell the story about its inception and how it will frame the district's work moving forward.

This phase will feature a **Portrait to Practice Session** with district leaders, focused on how to move the plan forward, leading and managing change, and how to deconstruct the district strategic plan with systemic coherence. This learning session will help to ensure the district is well equipped to implement and fully leverage the shared assets of the district and community. To accompany this session, BFK will provide a **Summary Report**, which will outline the entire process, along with recommendations for next steps.

Launch also means promoting the story behind the strategic plan, leveraging social media, website and signage updates, and other brand experience transformation inspired by the plan. The district will be responsible for the launch; to assist with this, BFK will provide, through the **Launch Phase Communications Tools**, internal and external communications recommendations, and guidance on the use of social media, websites, partners, and events as channels to reach all stakeholders.

The literal launch of the plan culminates in a community celebration to unveil it, first with staff (typically in an in-service session) and then with the community, as an evening event or series of events in schools. Many districts launch at the beginning of the school year, followed by school-level celebrations as part of back to school sessions early in the year.

As with earlier phases, BFK will continue to support through **Consultation and Capacity Building** phone calls with district leadership team.

Milestone/ Deliverable	Description	Est. Timeline
Portrait to Practice Session and Summary Report	Virtual session with District Leadership Team. Report describes both the portrait and strategic planning processes, and recommendations for next steps.	August 2022
Launch Phase Communications Tools	Resources for communicating with internal and external stakeholder groups specific to the Launch Phase Activities	August – September 2022
Consultation and Capacity Building	Monthly phone call with BFK to review on overall strategic direction of the engagement and build district capacity	Ongoing

Phase 6: Succeed



The successful plan requires successful implementation. BFK will schedule a strategic plan status check six months after the launch to review successes and challenges and further support the district leadership's success in putting the plan into action.

BFK will assist in planning and co-facilitating (virtually) the first six-month **Status Check** meeting. During this meeting District Leadership will share with the Design Team members progress to date on the goals outlined in their strategic plan.

These implementation status checks are recommended on an annual basis. Should the district wish additional support, BFK would be available.

Milestone/ Deliverable	Description	Est. Timeline
Status Check	Virtual session with District Leadership to discuss updates on activities to support the strategic plan	February 2023

COST OF SERVICES

Following are cost estimates for the services and solutions to support this engagement. Estimates are subject to change should the scope be modified.

Strategic Planning	
Prepare	<ul style="list-style-type: none"> District Leadership Orientation Meeting Project Charter Communications Toolkit and Consultation and Capacity Building (ongoing)
Envision	<ul style="list-style-type: none"> Portrait Design Team Meetings 1 - 4 Graphic Design Support for your Portrait of a Graduate
Inquire	<ul style="list-style-type: none"> Current State Analysis Support & Report Strategic Design Team Meeting 1
Design	<ul style="list-style-type: none"> Strategic Planning Framework Strategic Design Team Meetings 2 & 3 Strategic Plan Creation Counsel & District Leadership Consultation on Writing Strategic Plan Completion
Launch	<ul style="list-style-type: none"> Portrait to Practice Session and Summary Report
Succeed	<ul style="list-style-type: none"> Status Check

Total - Member Pricing	Onsite (where indicated)	Virtual
<i>Portrait of a Graduate (Phases 1 & 2)</i>	\$33,800	\$28,800
<i>Continuation of Strategic Planning (Phases 3-6)</i>	\$46,000	\$41,100
<i>EdLeader21 Membership (Current member)</i>	\$7,500	\$7,500
Total (Member)	\$87,300	\$77,400

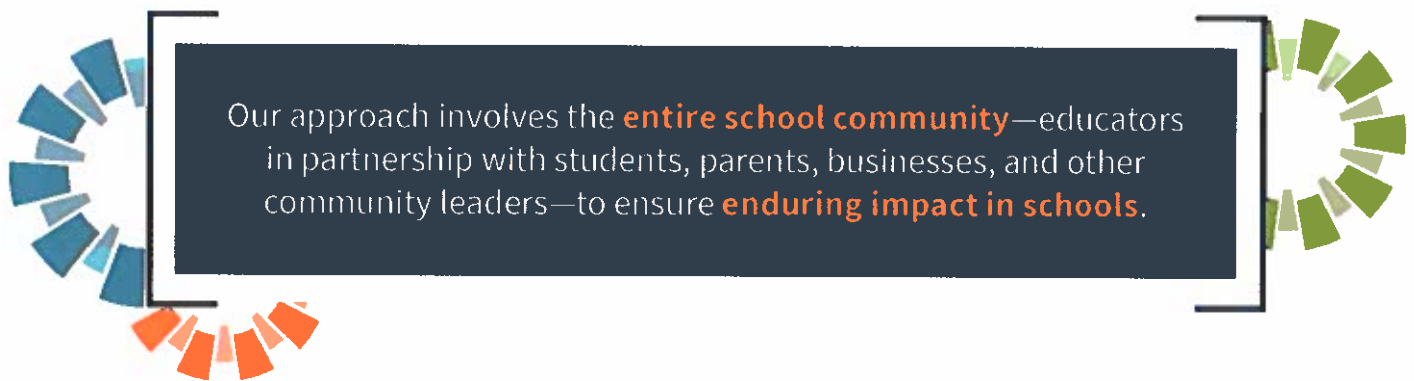
Total - Non-Member Pricing	Onsite (where indicated)	Virtual
<i>Portrait of a Graduate (Phases 1 & 2)</i>	\$37,500	\$32,500
<i>Continuation of Strategic Planning (Phases 3-6)</i>	\$51,300	\$46,400
Total (Non-Member)	\$88,800	\$78,900

ABOUT BATTELLE FOR KIDS

Battelle for Kids (BFK) is a national not-for-profit organization committed to collaborating with school systems and communities to **realize the power and promise of 21st century learning for every student.**

Our team of experienced educators alongside communications, technology, and business professionals innovates and partners with school systems to offer an educational experience that prepares all students to become lifelong learners and contributors in an ever-changing world.

We advance our mission by strengthening the **coherence**, **capacity**, and **connections** school systems and communities need to redefine learner success and accelerate the design and implementation of 21st century learning systems for all students. A systems approach ensures equitable access to rigorous 21st century learning systems for every student, regardless of where they live, what school they attend, or to which classroom they are assigned.



TRAVEL RESTRICTIONS NOTICE

Battelle for Kids continues to closely monitor the COVID-19 pandemic and will continue to make decisions regarding staff travel based on the recommendations and guidelines from the Centers for Disease Control and Prevention (CDC), and other city, state, and federal agencies. BFK will keep you updated regarding any relevant changes to our policies regarding staff travel that may affect this engagement.