



# Strategic Planning Facilitation Services Introduction and Overview

Presented to Steve Frank, Superintendent  
November 20, 2020



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Dear Steve,

Thank you for thinking of us as you and the Woodside School District consider embarking upon updating your current strategic plan to guide the next chapter of growth and development. Based on our recent conversation and in response to your Board interest in a planning process similar to what the District completed previously, we are pleased to provide you with an overview of our current facilitation and project management services.

Of note, as you think about possible timing, we have provided you with two possible options to begin the strategic planning process:

- **Option 1. January 2021** start would allow for a kick-off Board retreat in January as you have considered. This would be followed by Task Force recruitment in Jan-Feb and key recommendations in May-June to be finalized by you into a proposed plan over summer. This could feel rushed given disruption from the ongoing pandemic.
- **Option 2. Summer 2021** start would enable new Board members to transition into service and allow for completion of the planning process within a single school year. Under this option, preparation would begin this summer with Task Force kick-off in the Fall and conclude with key recommendations the following April during the next budget cycle.

We look forward to continuing our conversations at your convenience.

With gratitude,

*Lana Queensey*

*Gilbert Wai*

*Kawai Lai*

The Living Strategy Team



# OUR 5 PHASE APPROACH

We believe strategic planning can and should be done in an inclusive and iterative manner. This is why we intentionally have 3 community collaboration sprints throughout the project at the beginning, middle, and end of each project.



# A COMMUNITY THAT IS ENGAGED AND HEARD

In collaboration with the Superintendent and strategic planning leadership team, each community collaboration sprint typically starts and ends with the Board of Trustees given its role in school governance. Throughout the collaboration sprints, we engage with all types of stakeholders, including: administrative leadership, faculty and staff, parents and community, students, and alumni. Our goal across all of these input sessions — whether in-person when possible, live online, or through asynchronous surveys — is to make sure the community and its various stakeholder groups are heard, engaged in the process, and are able to contribute their ideas to the vision and strategy. These sessions also provide intentional opportunities to keep the community engaged and updated on progress as the plan evolves and help to develop and identify future advocates to help with implementation initiatives when the time comes.

## 5 FOCUS GROUP SESSIONS:

- Board of Trustees
- Leadership & Admin
- Faculty & Staff
- Parents & Community
- Students & Alumni



ONLINE SURVEY:  
Brainstorm themes

### Community Collaboration Stakeholder Sprint A

We start with collecting ideas from all stakeholders...this also signals the beginning of our strategic planning journey!



ONLINE SURVEY:  
Crowdsource ideas

### Community Collaboration Stakeholder Sprint B

We use an online survey in the middle of our journey to keep stakeholders engaged and collect feedback on emerging themes.

## 5 FOCUS GROUP SESSIONS:

- Board of Trustees
- Leadership & Admin
- Faculty & Staff
- Parents & Community
- Students & Alumni



ONLINE SURVEY:  
Gather feedback

### Community Collaboration Stakeholder Sprint C

We approach the end of our strategic planning journey re-engaging with each stakeholder group to gather feedback on the plan.

# Potential Timeline | Option 1



7-Month Duration  
*January Start Option*

## Stakeholder Inputs #1-3

include five groups per cycle

- Trustees
- Admin. Leadership
- Teachers & Staff
- Parents & Community
- Students & Alumni

### #1 Stakeholder Input Sprint A

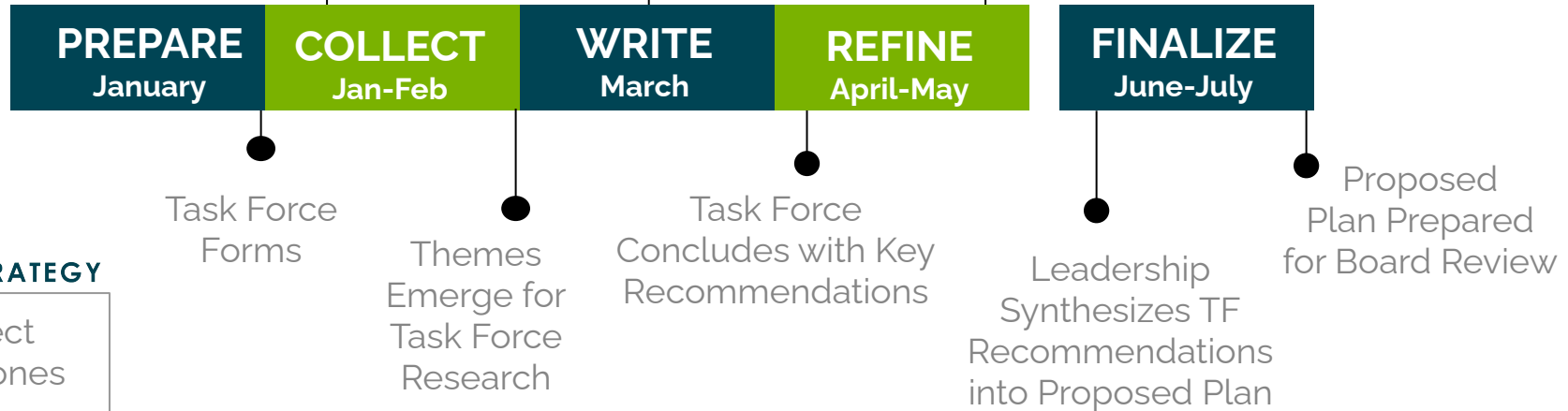
Survey + Focus Groups

### #2 Stakeholder Input Sprint B

Survey

### #3 Stakeholder Input Sprint C

Survey + Focus Groups



Project  
Milestones

# Potential Timeline | Option 2



7-Month Duration  
**July Start Option**

## Stakeholder Inputs #1-3

include five groups per cycle

- Trustees
- Admin. Leadership
- Teachers & Staff
- Parents & Community
- Students & Alumni

### #1 Stakeholder Input Sprint A

Survey + Focus Groups

### #2 Stakeholder Input Sprint B

Survey

### #3 Stakeholder Input Sprint C

Survey + Focus Groups

**PREPARE**  
July

**COLLECT**  
Oct-Nov

**WRITE**  
Jan-Feb

**REFINE**  
March

**FINALIZE**  
April

Task Force  
Forms

Themes  
Emerge for  
Task Force  
Research

Task Force  
Concludes with Key  
Recommendations

Leadership  
Synthesizes TF  
Recommendations  
into Proposed Plan

Proposed  
Plan Prepared  
for Board Review

  
**LIVING STRATEGY**

Project  
Milestones


# Strategic Planning Roles & Responsibilities

PLANNING PHASES	FACILITATORS <i>Manage process and consolidate drafts</i>	TASK FORCE <i>Synthesize ideas and research opportunities</i>	SUPERINTENDENT <i>Lead and supervise strategic planning process</i>	BOARD OF TRUSTEES <i>Set priorities, approve plan, allocate resources</i>
1. PREPARE	<ul style="list-style-type: none"> <li>Organize timeline</li> <li>Gather initial data</li> <li>Interview leadership</li> </ul>	<ul style="list-style-type: none"> <li>Represent stakeholder and community perspectives at TF planning meetings</li> </ul>	<ul style="list-style-type: none"> <li>Recruit planning team</li> </ul>	<ul style="list-style-type: none"> <li>Review and approve planning process</li> </ul>
2. COLLECT	<ul style="list-style-type: none"> <li>Facilitate community focus groups &amp; surveys</li> </ul>	<ul style="list-style-type: none"> <li>Attend focus groups &amp; review survey data to inform ideas to consider</li> </ul>	<ul style="list-style-type: none"> <li>Meet with facilitators to guide / monitor process</li> </ul>	<ul style="list-style-type: none"> <li>Select emerging themes for Task Force research</li> </ul>
3. WRITE	<ul style="list-style-type: none"> <li>Organize productive Task Force meetings to review input, research and develop ideas</li> </ul>	<ul style="list-style-type: none"> <li>Serve on working group focused on one or more themes for consideration</li> </ul>	<ul style="list-style-type: none"> <li>Update Board &amp; community on progress</li> </ul>	<ul style="list-style-type: none"> <li>Clarify WESD mission, vision, values, and student outcomes to guide strategic plan</li> </ul>
4. REFINE	<ul style="list-style-type: none"> <li>Design and facilitate Task Force retreat to draft initial ideas for Board consideration</li> </ul>	<ul style="list-style-type: none"> <li>Contribute to Task Force report summarizing ideas for Trustee review</li> </ul>	<ul style="list-style-type: none"> <li>Encourage community engagement / input</li> </ul>	<ul style="list-style-type: none"> <li>Review and provide feedback on emerging ideas during process</li> </ul>
5. FINALIZE	<ul style="list-style-type: none"> <li>Consolidate Task Force ideas into one draft plan for Board review</li> </ul>	<ul style="list-style-type: none"> <li>Review feedback and refine draft report / plan</li> </ul>	<ul style="list-style-type: none"> <li>Attend TF meetings and stakeholder focus groups</li> <li>Review findings and emerging ideas in drafts</li> <li>Help refine draft report based on feedback</li> <li>Lead implementation planning / tracking</li> </ul>	<ul style="list-style-type: none"> <li><b><u>Set strategic direction for WESD by approving final strategic plan</u></b></li> <li>Allocate resources for next steps &amp; priorities</li> </ul>

Community stakeholders are engaged throughout at the beginning, middle, and end of project through Collaboration Sprints A, B, C.

# FLEXIBILITY IN SUPPORT AND FACILITATION

Our approach typically spans 5 phases of highly focused work facilitated by Living Strategy and completed in collaboration with Woodside Leadership, Trustees and Task Force members. Facilitation services and project management fees average \$50,000 per project payable over 10 months.

 LIVING STRATEGY	Phase 1 PREPARE	Phase 2 COLLECT	Phase 3 WRITE	Phase 4 REFINE	Phase 5 FINALIZE
KEY DELIVERABLES	Data Assembled and Meetings Scheduled	Task Force Formed Themes Emerge	Initial Draft of Recommendations	Key Task Force Recommendations	Superintendent Submits Draft Plan to Trustees
Leadership Planning & Project Coaching Calls	1 calls	2 calls	2-3 calls	1-2 calls	1 call
Trustee Updates	1 update	1 Board Retreat + 1 update	1 update	1 update	1 update
Task Force Meetings	--	2 meetings	2 meetings + 2 day retreat	1 meeting	1 meeting
Stakeholder Focus Group Sessions	--	3-5 Focus Groups Brainstorm Themes (Sprint A)	--	3-5 Focus Groups Gather Feedback (Sprint C)	--
Collaboration Sprints A-C Stakeholder Input	--	1 Survey Brainstorm Themes (Sprint A)	1 Survey Crowdsource Specifics (Sprint B)	1 Survey Gather Feedback (Sprint C)	--
Key Areas of Focus during this Phase	Get organized, plan activities, recruit team	Collect stakeholder input, identify emerging themes	Create draft vision & plan, prioritize ideas to consider	Refine vision & plan, create roadmap	Share plan & celebrate!

Project Scope:

7-9 Total Planning calls

5 Total Trustee updates + 1 Board Retreat

8 Total Task Force Mtgs.

6-10 Total Focus Groups

3 Total online Surveys

Phases 2 & 3 represent the most critical times during the planning process with the greatest opportunity to collect input and engage stakeholders. By keeping these two phases highly concentrated — 4 weeks of focused activities spread across 4 calendar months — our predictable schedule provides an intense, but clearly defined volunteer commitment. The projects are intentionally paced to be fast enough to generate momentum and sustain engagement, while still allowing adequate time for community collaboration and idea development.





# YOUR TEAM



**Lana Guernsey**

Lana brings 20+ years experience in education as a consultant, facilitator, teacher, and administrator. She has worked with many of the most innovative public, charter, and independent schools in Silicon Valley. She currently teaches communications at Design Tech High School on the Oracle campus, and her **TEDx** talk – *Earthquake: Harnessing Moments that Move You* – inspires individuals to take action on their ideas. Prior to her education career, she worked in life sciences and biotechnology and has a Master's degree in Management from Stanford Graduate School of Business and a Bachelor's degree in journalism.

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**Gilbert Wai**

Gilbert has a broad range of strategy and leadership expertise from high technology, public education governance, and non-profit strategic planning. He is a proven Silicon Valley engineering executive with Senior VP roles in engineering and product development leadership at high growth, venture-backed startups through two IPOs and one acquisition. He is a trustee on the Hillsborough, CA school board, where he was board president and served on the District Visioning, Finance, and Communications board committees. He has a Bachelor's degree in Electrical Engineering and Computer Sciences from University of California, Berkeley.

[linkedin.com/in/gilbertwai](https://www.linkedin.com/in/gilbertwai)



**Kawai Lai**

Kawai is a designer and facilitator serving schools focused on strategic planning, diversity, equity, and inclusion. She is a co-author of **The New Team Habits** © 2020, which provides practices for leaders to build better habits for team learning, meetings, and projects. She started VizLit to unleash the visual mind of every learner, formerly served as Vice President of Innovation at the National Association of Independent Schools (NAIS), and helped launch and grow Education Elements. Prior to her career in education, Kawai was at Deloitte Consulting. She has an MBA from the University of California, Berkeley and a Bachelor's degree in Mechanical Engineering.

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## SAMPLE CLIENTS



# WHAT GUIDES OUR WORK

## INCLUSIVE

We believe in the importance of diversity and psychological safety. We embrace differences and create spaces where it's safe to take risks, share ideas, and be vulnerable so all voices can be heard.

## RESPONSIVE

We are driven by purpose. We respond rapidly through the open flow of information, encourage iteration, and collaborate to reach our shared purpose.

## VISUAL

We make the abstract and complex more concrete. We use visuals as a thinking tool and create visual experiences online or in-person that lead to meaningful insights and clearer ideas.

# Thank you!

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