



# Nebraska State Board of Education

## Strategic Planning



# Outline of Presentation

- **About Public Works**
  - High-Level Strategic Planning Experience
  - Education Experience
  - Our Team
- **Project Workplan**
  - Timeline
  - NDE Involvement
- **Additional Questions**
  - Successful Implementation, Project Sustainability, Budget, One Piece of Advice
  - Why **Public Works**?
- **Conclusion**



# Public Works: A Unique Combination



# Strategic Planning

- **Broward County, Florida**
  - Comprehensive Community Needs Assessment & Strategic Planning
- **California State University**
  - Strategic planning process for workforce development programs
- **Connecticut Office of the Secretary of the State**
  - Strategic plan
- **West Virginia State Treasurer's Office**
  - Strategic plan
- **City of Atlanta**
  - Strategic planning around poverty issues
- **Rhode Island Governor's Workforce Board**
  - Comprehensive System Improvement Plan
- **California Attorney General's Office**
  - Engaging Key Stakeholders in Strategic Planning
- **Eric Schnurer**
  - Founded **Public Works** in 1995
  - Former gubernatorial chief of staff
  - Speechwriter or policy director for 12 presidential candidates
  - Has advised Governors, Mayors, US Senators in a majority of states
  - Professor of public policy
    - University of Chicago
    - University of Pennsylvania
    - Brown University
    - Woodrow Wilson Scholar
  - Writes regularly for:
    - *The Atlantic*
    - *US News & World Report*
    - Aspen Institute
  - AB Brown University, MPP Harvard Kennedy School of Government, JD Columbia Law School

# Education Experience

- Alaska Department of Education and Early Development (DEED)
  - Performance Review
- West Virginia Department of Education
  - Performance Review
- New Mexico Public Education Department
  - Performance Review
- Arizona & West Virginia P-20 Councils
  - alignment of K-12 w/ post-secondary study and workforce demands
- California State and Consumer Services Agency
  - Reforming the California school construction process
- Washington State Department of Early Learning
  - Best practices and innovative approaches for childcare subsidies
- South Carolina Department of Education
  - 4 School Districts Review
  - technical assistance in creating a statewide performance review initiative
- California Student Aid Commission
  - Review of non-profit loan auxiliary, EDFUND
- Louisiana Department of Children and Family Services (DCFS) and Department of Education (LDOE)
  - Early Childhood System Implementation
- State of California Children and Families Commission
  - Comprehensive early childhood literature review
- New Orleans Recovery School District
  - Performance Review
- California Superintendent of Public Instruction
  - Redesign of Career & Technical Education for 21<sup>st</sup> Century

# Dr. JoAnn Cox

- Project Manager
- Doctoral-level education background
  - Ed.D. & Ed.S. in Education Administration
  - M.S. in Education
  - B.S. in Education/Communication
  - All from Florida State University
- 13 years' experience teaching in a priority school in Florida
- Florida Department of Education
  - High-needs schools improvement team leader
  - Worked with Florida Ass'n of School District Superintendents (various trainings)
  - Works on efficiency and effectiveness review teams
- 15 years' consulting experience

# Dr. JoAnn Cox: Consulting Experience

Expertise in school district operational efficiency, district organization and management, strategic planning, curriculum and instruction, low performing schools, and parent and community involvement, including:

- Led performance review
  - Utah Department of Education
- Lead evaluator, 2-year evaluation of school improvement programs
  - South Carolina Education Oversight Committee
- Oversaw 4 school district efficiency and effectiveness reviews
  - South Carolina Department of Education
- Development of school improvement planning process
  - Michigan Department of Education
- Led team of 20 consultants, focused educational reviews
  - Washington Office of Superintendent of Public Instruction
- Led team of 20 consultants, school improvement plans
  - 18 of LAUSD's lowest-performing schools
- Hawaii, Michigan, & Utah Departments of Education
  - Long- and short-term planning projects
- Program evaluation and school improvement assistance, selected low-performing schools
  - Hawaii Department of Education
- Led team of 15 consultants, performance review of Clark County School District
  - Nevada Legislative Counsel Bureau
- Led/participated in over 30 school district efficiency performance reviews, all 20 regional educational service agencies
  - Texas Legislative Budget Board
- Oversaw 10 simultaneous reviews of Virginia school districts
- Led reviews of 9 regional service agencies in New Mexico

# Dr. Robert Schiller

40 years at the state, district, school, classroom, higher education as well as national consulting levels, including:

- Responsible for strategic planning process in 4 states
  - Michigan, Illinois, Maryland, and Louisiana).
- As consultant, guided strategic process and/or authored the strategic plans
  - LAUSD & Baltimore City Schools
- State Superintendent of Education
  - Illinois, Michigan
- Deputy State Superintendent of Education
  - Delaware, Louisiana
- Superintendent of 5 school districts,
  - Assistant Superintendent/(Interim) Senior Deputy Superintendent, LAUSD
- CCSSO
  - Chair, Legislative Committee
  - Member, Long-Range Planning, Standards & Assessment Committees
- Principal of 2,500-student high school
- English teacher
- College: full professor, department director
- Consultant past 8 years
  - over 60 state department/district/school comprehensive evaluations
  - numerous executive searches, executive coaching for new superintendents
- Author of 40 articles and 8 novels
- Doctoral-level education background
  - Ed.D., Organizational Leadership and Finance, University of Pennsylvania
  - M.S., Organizational Leadership and Curriculum, University of Pennsylvania
  - M.S., Administration and Finance, Rutgers University
  - M.A., English, University of Mississippi

# Laura Dukess, J.D.

- 8 years consulting:
  - Program design, management and facilitation for US DOE-funded school leadership program
  - Lead designer and facilitator for creation of South Dakota leadership continuum
  - Evaluated pilot of Minnesota state-wide principal evaluation system
  - Provided technical assistance to regional educational association, North Dakota
  - Analysis of Gwinnett County (Georgia) Public Schools' Principal Mentor Program
  - Lead evaluator for five-year federally-funded program to develop and support improved school leadership, Puerto Rico
  - Co-design and facilitation, Middle School Leadership Internship Program, NYC Department of Education, Office of Teacher Recruitment and Quality
  - Research and development of strategies, Council of Chief State School Officers
- Director, Professional Development
  - New York City Department of Education, Office of School Leadership
- Director of Leadership Development
  - New York City Department of Education, Region One Learning Support Center
- Director of Programs
  - New Visions for Public Schools
- Project Director. *Toward a Just and Equitable Education*
  - Center for Educational Outreach & Innovation, Teachers College, Columbia University
- Practicing attorney for 9 years, specialty in design/analysis/defense of affirmative action
- Extensive publications on school leadership, principal training, failing schools, education standards, school governance
- J.D., Columbia University School of Law
  - Member, Education Clinic.
- B.A., *cum laude*, University of Pennsylvania

# Additional Team Members

- **Stephanie Walsh**
  - M.A. in Secondary Education
  - Former teacher
  - Principal legislative analyst, Colorado State Legislature
  - 6 years consulting with **Public Works** in education, workforce development
  
- **Daniela Glick**
  - Deputy Cabinet Secretary, New Mexico Department of Economic Development,
    - Led development of New Mexico Clean Economy Strategy w/ Departments of Public Education, Higher Education, and Workforce Solutions
  - Director of Cabinet Affairs, NM Governor's Office
    - Designed and passed legislation to reconfigure Department of Workforce Solution
  - Member, South Carolina School Districts Review
  
- **Jennifer Wall**
  - MBA, Thunderbird School of Global Management
  - Member of our review team, Alaska Dept. of Education & Early Development



# Project Workplan



# Overview of Methodology

- Project Kickoff
- Data Collection
  - Document Review
  - E-Survey of Community Partners
- Engaging Stakeholders
  - Plan/Implement with State Board, NDE Staff
  - Solicit Regional Input
  - On-Site Meetings
  - Town Hall Meetings
  - High-Level Input
- Analysis
  - Conduct SWOT and Additional Analysis
  - Research Best Practices and Additional Opportunities
  - Conduct Financial Analysis
- Develop Strategic Plan
- Performance Metrics
- Develop Implementation & Sustainability Plan

# Phase One: Project Launch

	2016							
	January	February	March	April	May	June	July	August
<b>Project Launch</b>								
Initial On-site Project Launch Meeting								
Review work plan and timeline								
Establish key contacts								
Establish project reporting format and preferred communications protocols								
Review data sources and develop supplemental data/document requests								
Gather and analyze public data, reports, strategic plans, etc.								
Determine process for any future project modifications, if needed.								
Submit finalized project timeline and work plan								
Submit monthly status reports.								
Submit preliminary list of individuals to be interviewed.								

# Phase Two: Data Collection

	2016							
	January	February	March	April	May	June	July	August
<b>Data Collection</b>								
Collect required data (including performance data, reports, policy and procedural documentation etc.)								
Review core services, priorities, goals, and objectives as set forth in statute, regulation, and policy.								
Conduct initial management and staff interviews.								
Document current results-based measures in conjunction with priorities, goals, and objectives.								
Develop preliminary findings.								

# Phase Three: E-Survey of Community Partners

	2016							
	January	February	March	April	May	June	July	August
<b>E-Survey of Community Partners</b>								
Develop draft survey for review and approval								
Compile list of participants in consultation with the Board								
Distribute survey								
Collect and analyze results								
Synthesize findings								

# Phase Four: Engaging Stakeholders

	2016							
	January	February	March	April	May	June	July	August
<b>Engaging Stakeholders</b>								
Solicit input from representatives from eight districts represented by Board members								
Conduct on-site meetings with key identified members, managers, and staff								
Coordinate up to three Town Hall meetings								
Coordinate meetings with high-level education policy makers								

# Phase Five: Conduct SWOT & Additional Analysis

	2016							
	January	February	March	April	May	June	July	August
<b>Conduct SWOT and Additional Analysis</b>								
Utilize data collected through document research and stakeholder interviews and surveys to conduct SWOT analysis								
Synthesize findings								
Financial analysis								

# Phase Six: Research Best Practices

	2016							
	January	February	March	April	May	June	July	August
<b>Research Best Practices</b>								
Research and identify national best practices.								
Conduct best practices research on alternative measures and associated costs and benefits.								
Interview staff and incorporate stakeholder input.								
Develop findings and preliminary recommendations.								

# Phase Seven: Develop Strategic Plan

	2016							
	January	February	March	April	May	June	July	August
<b>Develop Strategic Plan</b>								
Prepare Issues Docket for discussion.								
Conduct Tollgate session with client to review docket and decide which issues go forward.								
Conduct additional research, if needed.								
Submit draft report for client review and feedback								
Incorporate feedback into final preliminary draft.								

# Phase Eight: Develop Implementation Plan

	2016							
	January	February	March	April	May	June	July	August
<b>Develop Implementation Plan</b>								
Review and refine preliminary action plan based on interviews, research, best practices, and analysis.								
Draft implementation plan for client and (select) stakeholder review and feedback								
Submit final implementation plan								

# NDE Involvement

## ■ Public Works:

- Regular client conferences
- Minimum 8 full-day on-site meetings
- e-Survey
- Ongoing exchange and interaction
- Tollgates
- Full engagement re: Stakeholder Meetings, Town Halls, etc.

## ■ From NDE:

- An assigned Project Manager from NDE
- A commitment to interviews, meetings, data requests, and follow-up
- A mutually agreed-upon workplan and timeline that is doable for NDE leaders



Additional Questions



# Factors Impacting Successful Outcome

- A priority from the top, down
- Respect for staff from the bottom, up
- Clear and focused workplan and roles
- Constant communication
- Use of best practices
- Wide range of stakeholder input
- A safe forum for “agreeing to disagree”
- Setting clear and attainable goals
- Flexibility: “No plan survives contact with the enemy” (e.g., ESEA reauthorization)
- An unbiased facilitator who understands the substance – and the realities
- “Resultants” – not just consultants

# Project Sustainability

- Many well-intentioned plans have failed due to lack of sustainability foresight
- Projection of resources that should continue year after year
- Professionally-designed strategic planning templates for Board, customized with Nebraska-specific information:
  - monitoring successes
  - strategy maps
  - balanced scorecards
  - SWOT diagrams
- Tollgate process identifies political, bureaucratic, and budget realities – not just policy ideals
- Institutionalization: Knowledge-transfer component from consultants to NDE
- Major determinant of long-term sustainability: Upfront line-staff buy-in

# Budget

- No change in our proposal
  - We always anticipate:
    - stakeholder involvement
    - on-going implementation
- Fixed-price proposal:

	Hours	Professional Fees (includes all travel expenses and overhead)
Project Kickoff	55	\$12,100
Data Collection	80	\$17,600
Document Review	125	\$27,500
E-Survey of Community Partners	155	\$34,100
Engaging Stakeholders	210	\$46,200
Conduct SWOT and Additional Analysis	60	\$13,200
Research Best Practices	55	\$12,100
Develop Strategic Plan	175	\$38,500
Develop Implementation Plan	80	\$17,600
<b>Total</b>	<b>995</b>	<b>\$218,900</b>

# Why Public Works is the Best Choice for Nebraska

- **Knowledge of Education Second to None**
  - Firm experience with all segments – pre-K, K-12, CTE, higher ed
  - Firm experience at all levels – school operations, regional, on up to statewide
  - Team member experience teaching, school/district/statewide administration
  - Studied everything from school lunch line to top-level policy decisions
- **Know Public Sector – and How to Make It Work**
  - Beyond the academic: In-depth knowledge of government at highest levels
  - Experience working with State Boards, SSAs, University Chancellors, Legislators, Governors
- **Interactive Process, Focus on Results**
  - Client satisfaction
  - Respect for staff and employees at all levels
  - Participation
  - Values and commitment

# One Piece of Advice

“We don’t actually do what we propose – we just propose it”



[www.public-works.org](http://www.public-works.org)

