

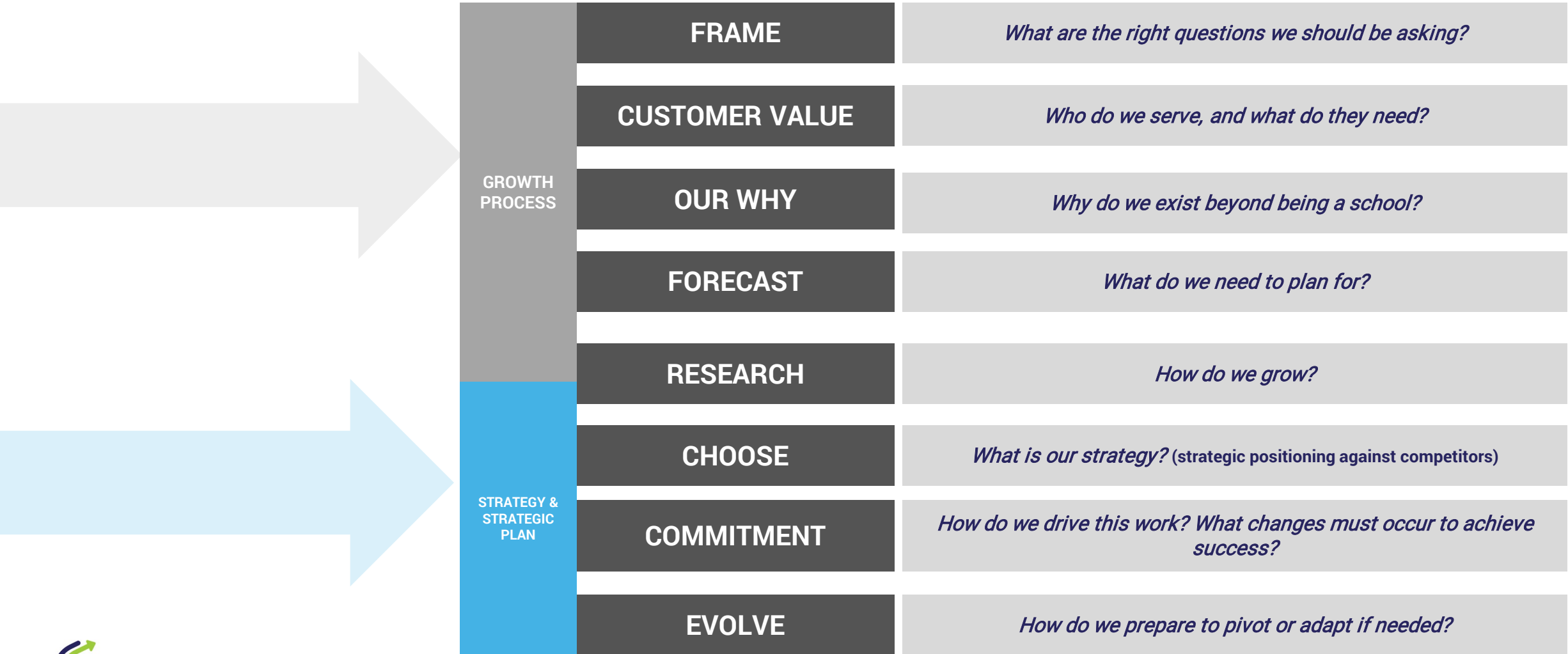
Stratavize's Process To Creating Alignment and Success

Stratavize Consulting Inc.'s process for strategic planning.

Growth, Strategy, and Strategic Plan

- **Growth** – how will the school corporation will increase revenue. (i.e. increase enrollment, does it matter to the school right now?)
- **Strategy** – a strategy is how the school will differentiate itself. A strategy makes clear what an organization will do and will not do. (what story do you want to tell parents?)
- **Strategic Plan** - a strategic plan is your road map to executing a new growth plan and implementing a strategy. A strategic plan lays out the key pillars or buckets of the work, the goals, objectives, outcomes, and metrics. A strategic plan is meant to guide the work.
- **Implementation and Activation Plan** – this is the detailed worked plan that answer who does what by when.

The Process For Choosing a Growth Model and Strategy



Whole-Systems View of Change

Change isn't just about implementing a new project or system, it's about aligning people, culture, operations, and strategy so they work together.

Too often, organizations focus on one piece (like technology or process) while ignoring the ripple effects across the rest of the system.

The Stratavize Transformation Model gives leaders a way to see the full picture, ensuring that every part of the organization moves in sync to make change stick.

Why This Matters for Leaders

Prevents “change silos”. Ensures consistency: what leaders say, what systems do, and what people experience all match. Gives executives a roadmap for identifying hidden gaps that derail change.

Stratavize Transformation Model



The 5 Dimensions of Transformation

1. Value – The unique promise to customers & community.
2. Leadership, People & Org Structure – How teams work, lead, and collaborate.
3. Operations – Daily systems, processes, and technology.
4. Culture – Norms, values, and behaviors that drive the “feel” of the organization.
5. Strategy – The path to the best envisioned future.

Process To Develop A Strategy & Strategic Plan

We take a 6-step approach to developing a **Strategy and Strategic Plan**. Each step of the process you will can scale up or down the services to meet your unique circumstances and budget.

The Steps Include:

1. Explore
2. Align
3. Visioning
4. Strategy
5. Implementation
6. Culture

STAGES OF STRATAVIZE CONSULTING'S STRATEGIC VISIONING MODEL

FOR K-12 SCHOOLS



Tough Questions Ask Before Beginning The Process

How *do we intend to use this Strategic Plan*?

- Will the plan be used to make decisions in the future?
- Will it be used to tell our story to internal and external stakeholders?
- Will it be used to guide our work internally, thereby details matter?
- Will it offer only direction and high-level context for internal/external stakeholders?
- What data is critical to collect for us to make decisions that will align with our purpose of this plan?

Are we ready to commit the time and resources to ensure a quality output?

- Who will form the small tactical working team that will have the authority to make decisions?
- Are board members willing to devote the time to co-create the strategic direction of the school?
- Who has what role? Are board members focused on strategy but not tactics? Are the board members going to be involved, to what depth? Should we have representatives from the community on a strategic planning task force?

Are we ready to talk, really talk?

- What are the biggest decisions that must be made as part of this process?
- Are we ready to have hard conversations?
- What are our doubts or reservations about this process?
- What decisions have recently been made that should not be revisited during this process (i.e. a new mission statement, internal process changes, etc.)

Are we going to launch the plan or actively work the plan or both?

- Do we intend to formally launch this strategic plan to our internal and external stakeholders? If so, when? How can we do this right?
- Do we plan to turn this plan into an active plan thereby it will need to be embedded into our everyday management routines? If so, how do we do that?



Best Practices For Strategic Planning:

- 1. Small Tactical Team** that will help with quick decision making, logistics, and will work directly and regularly with the Stratavize Team. This team will edit the final plan. (2-5 members is ideal)
- 2. Strategic Planning Task Force**, this group will co-create the strategic direction of the school including the North Star and development of key pillars/buckets of the work. They will attend an in-person workshop.
- 3. Brand guide** with color codes, logo, tagline, etc.

Phase 1: Where Are You Now?



- Stakeholder Engagement:** Hear from those you serve and wish to serve through surveys, focus groups, and listening sessions.
- Environmental Scan:** The external forces that impact your organization.
 - Context map includes trends, technology, economic factors, political impact, regulation, changes in behavior, etc.
- Internal Scan:** Assessment of the organization's internal capabilities.
 - Assessments can include: Leadership alignment, HR infrastructure assessment, communication audit.
 - Evaluate: Mission and Vision Statement to determine if needs to be updated during the Strategic Visioning Process.

Questions To Ask Yourself:

- What do we want to learn and why and from whom?*
- Who are our students, families, and community partners? What do they need from our schools today?*
- What trends (e.g., technology, student demographics, funding, policy) are shaping K-12 education, and how are they affecting us?*
- Do our mission and vision still reflect our community's values and aspirations for education?*
- Where are we strongest, and where are we struggling as a district (academically, operationally, culturally)?*

Stages of Stratavize Consulting's
STRATEGIC VISIONING MODEL

ALIGN

- To current realities
- To the WHY of the organization
- To constraints and conditions



Phase 2: Where Do You Want To Go & Why

- Examining Current State:** Analyzing and understanding current market conditions. This can be provided via a report, reviewed at a meeting, or included in the strategic visioning sessions.
- Gain Alignment:** Review, discuss, and gain alignment on current realities, constraints, and opportunities.
- Visioning:** Begin to open up to what you want to be known for in the future.
- Goal Setting:** Develop goals for the organization.

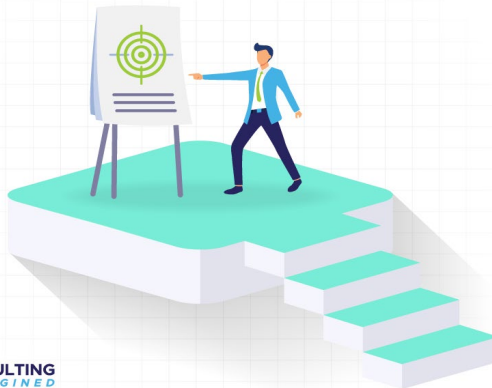
Questions To Ask Yourself:

- What kind of graduate do we want to produce, and how do we define student success beyond test scores?*
- How do we want our schools to be known in the next 5–10 years (locally, regionally, nationally)?*
- What are the major barriers holding us back from becoming the district we envision?*
- How do we balance innovation with accountability in our district?*
- Are we ready to have honest conversations about equity, access, and outcomes for all students?*
- What goals will ensure all students are prepared for post-secondary success (college, career, or military)?*

Stages of Stratavize Consulting's
STRATEGIC VISIONING MODEL

VISIONING

- Become open to a new vision
- Creation of new vision and mission
- Define the goals of the organization



Phase 3: How Do You Get There



- Strategy Development:** Co-creation of the path forward to differentiate you from others. Strategic visioning typically occurs at a gathering, either a full day, two days, or three days.
- Options include:**
 - Strategic Framework** – this can be done in a half day. The deliverable is a 1-page strategic plan with pillars and high-level goals.
 - Strategic Plan Lite-** this is less than 8 pages that shares your strategy, pillars and goals. This can be completed in 1 full day.
 - Strategic Plan-** this a full plan that shares your strategy, pillars, goals, objectives, outcomes, and metrics. A full Strategic Plan can be completed in 3 full days but can also take months to fully complete.

Questions To Ask Yourself:

- What makes our school district different from others in our region?*
- What key pillars (e.g., academic achievement, staff development, community engagement) should guide our strategy?*
- What initiatives or programs should we start, stop, or improve to meet our goals?*
- What role will each stakeholder group (teachers, parents, students, board members) play in achieving our vision?*
- What specific and measurable outcomes will tell us we're making progress?*
- How do we ensure our strategic plan becomes a living document, not a binder on a shelf?*

What's included in a Full Strategic Plan?

- ❑ Introduction
- ❑ Engagement Process
- ❑ Executive Summary
- ❑ **Identity Statement***
- ❑ Mission, Vision, and Core Values
- ❑ Data/Stats that influenced the work
- ❑ **Graduate Profile***
- ❑ **North Star*** (primary outcome of the organization)
- ❑ **Pillars*** (3 big buckets)
 - ❑ Goal (what you want to accomplish)
 - ❑ Objective (how you'll accomplish it)
 - ❑ Outcome (changes in conditions; behaviors, knowledge, attitudes, etc.)
- ❑ **Key Priorities*** aligned to the Pillars (2-3 Key Priorities)
 - ❑ Goals (what you want to accomplish)
 - ❑ Objectives (how you'll accomplish it)
 - ❑ Outcome (changes in conditions; behaviors, knowledge, attitudes, etc.)
 - ❑ Indicators (leading and lagging)
- ❑ **Theory of Action***
- ❑ Acknowledgements

Pillar 1: People

- **Goal:** To have the best people in the industry working with us.
- **Objective:** To have recruiting, onboarding, and retention policies and processes that promote diversity, create a sense of inclusion and belonging, and development path for all team members.
- **Outcome:** A culture of passionate, inspired, and connected team members.

Recruiting

- **Goal:** To recruit top talent.
- **Objectives:** Equitable recruiting process.
- **Objectives:** A simplified hiring process.
- **Outcome:** Candidates feel seen, heard, and welcome during the recruiting process.

Onboarding

Retention

KPIs:

- Increase % of diverse candidates
- < # days from job opening to filled position

NOTE: Each plan is customized based on the client's needs and scope of work.

What's Theory of Action?

A theory of action is your organization's story (aka theory) of how it will make change or what will happen when a set of strategies is implemented. Essentially, the largest impact you want to make.

*If we do **this** thing... Then we will see **this happen**... which will **lead to this**... and **which will result in that outcome** that we want to see.*

Goal: To recruit top talent.



▪ **Objectives:** Equitable recruiting process.

▪ **Objectives:** A simplified hiring process.

Monitor and adjust practices based on:

- Increase % of diverse candidates
- < # days from job opening to filled position

Outcome:

Candidates feel seen, heard, and welcome during the recruiting process.

Phase 4: Enjoying The Journey

Stages of Stratavize Consulting's **STRATEGIC VISIONING MODEL**

IMPLEMENTATION

- Build capacity within teams
- Create Implementation Plan
- Define Resources
- Develop Workstreams
- Develop objectives, tactics, milestones and success metrics
- Design a marketing plan to support the strategy



Activating the Strategy:

- Create an activation plan** - the team knows the "why" behind this work, internal champions, and creates energy around this effort.

Tools and Services We Can Provide:

- Road Map / Role Map
- FAQs
- Commitment Assessment
- Change Readiness Assessment
- Training Plan and/or Training Materials

Questions To Ask Yourself:

- How will we build understanding and enthusiasm for the strategic plan across all schools and departments?*
- Who will lead the implementation work and keep the momentum going?*
- How will we embed the strategic priorities into our school improvement plans and everyday practices?*
- What support and resources do our educators and leaders need to bring the plan to life?*
- How will we align our hiring, budgeting, and policy decisions with the plan?*

Phase 5: Reflecting On The Journey

Tools and Services We Can Provide:

- Check in** - to measure progress and adoption of embedding the strategic plan into everyday business practices of the organization.
- Measure Impact** – provide a follow-up survey to compare to the benchmark.
- Rewards and Measures Alignment** – this determines what is important, what will be measured, what gets done and not done, and what rewards will be given.

Questions To Ask Yourself:

- How will we measure progress toward our strategic goals over time?*
- What tools or dashboards will help us track performance in a transparent and meaningful way?*
- How will we celebrate success and recognize the work of staff, students, and community partners?*
- What's our plan for ongoing review and adjustment of the strategy?*
- How do we ensure continuous improvement without burning out our staff and leadership?*



Telling Your Story Using One Page

One Page Strategic Plans Overview



One Page Strategic Plan

Why Use One Page Strategy

- ✓ Ability to tell your story on one page using visuals, metaphors, graphics and more.
- ✓ Provides a quick overview to, an often lengthy, strategic plan.
- ✓ Great for sharing with customers/clients, funders, employees/staff, grantors, board members, the public and more.
- ✓ Can be printed and laminated to act as “placemat” for meetings; this keeps group rooted in the work.
- ✓ Easily casts a vision for others to learn about your organization.

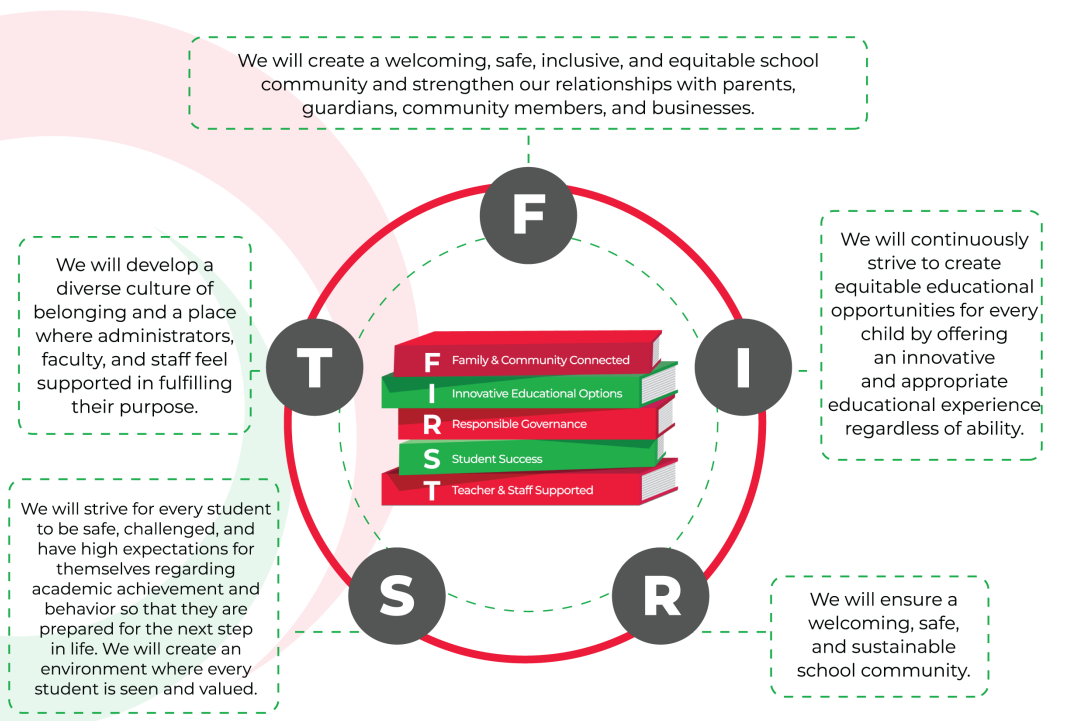
Design Considerations

- ✓ Should reflect your Strategic Plan but, how much to include varies
- ✓ Must align to your brand, colors and overview all presence
- ✓ Consider what story do you want to tell
- ✓ Consider the level of detail to include, do you want important projects visible or will that date it to quickly



Our Strategies

Our F.I.R.S.T Strategies will ensure every student achieves their own version of success from the moment they walk through our doors until they graduate and enter the world. Our goal is simple: Anderson Communities Schools will be the first educational choice for families in Madison County.



- Use of a circle means a continuous cycle. There's not end or beginning.
- Focus on 5 key priorities.
- Clean, fresh look.
- Clear on what is guiding the organization.

What Guides Us

Our plan is for Anderson Community Schools to become the hub that connects or touches every part of Anderson: the students, parents, staff, and community. We're thinking big and broad. We want the things we do at ACS to build trust, drive equitable change, and embrace diversity so that Anderson becomes a kind, invested, and engaged community.

Stratavize Consulting Inc.

Stratavize Consulting began with a bold leap—a single person leaving corporate America to become a trusted strategy advisor. What started as one passionate individual quickly grew into a team of highly skilled, caring, and mission-driven consultants.

From the start, our vision was simple: to help organizations navigate challenges, reimagine strategies, and achieve meaningful results. Rooted in integrity and collaboration, we've built a reputation for providing honest advice and innovative solutions that make a lasting impact.

Today, we're more than consultants; we're partners in progress. Whether guiding leaders through change or helping teams work better together, we bring energy, expertise, and a commitment to your success. Stratavize's story is one of growth and purpose—and we'd love to be part of yours.

To learn more visit: [Stratavize.com](https://stratavize.com)

