

THE CAMBRIAN GROUP

July 2, 2021

Dr. Allan Markley
Superintendent
Raytown C-2 School District
608 Raytown Road
Raytown, MO 64133

Dear Dr. Markley:

We are pleased to submit our proposal for **STRATEGICS®**, including Thinking, Planning and Action. We have built in a tentative schedule and can adjust where necessary. This proposal also includes information about our **Internal Facilitator Training Program**. In addition to the program scheduled in July we will have one November 8-11, 2021 in Kansas City, MO.

As you know, our firm, established in 1978, is the originator of the authentic strategic planning for education. In fact, we wrote the book on it, **Strategic Planning for America's Schools**. This is the classic text used by colleges and the genesis of almost all planning by education professionals. Complete information about our Firm, Associates, Programs and Publications can be seen at www.thecambriangroup.org

We have facilitated plans in over 1,450 schools school systems and have trained over 16,000 strategic planning facilitators. The Cambrian Process and Discipline is still the ultimate in Strategic Planning. Not only has our original version been strengthened and deepened, but it is enhanced by Strategic Thinking, as the preliminary activity, and Strategic Action, as the only way to guarantee successful implementation. In addition, our exclusive software enables a district to track, monitor and report all aspects of the plan.

Thank you for the opportunity to present our holistic planning system. We pledge you our very best effort.

All the best,

Vonda C. McLain
Vonda C. McLain
Executive Vice President

5795 Carmichael Parkway/ Montgomery, AL 36117/334-356-7158/www.thecambriangroup.org

A PROPOSAL FOR

STRATEGICS®
Thinking, Planning and Action

Submitted to
Raytown C-2 School District

Prepared by
Vonda C. McLain

The Cambrian Group
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NOTE: THIS PROPOSAL IS DIVIDED INTO THREE PHASES*:

PHASE I

Strategic Thinking (Step 1)

PHASE II

Strategic Planning (Steps 2-10)

PHASE III

Strategic Action (Steps 11-13)

***Please see attached chart.**

STRATEGIES: THINKING / PLANNING / ACTION

THINKING

1. The Five Arenas of Strategic Thinking
 - Definitions
 - Condition vs. Cause
 - Leaders vs. Leadership
 - The Nature of Systems
 - Dynamics of Organization

PLANNING

2. Commitment and Preparation
 - Internal Facilitator(s) training
 - Awareness Sessions
 - Exploration of System Capacity and Design
 - Information Base
3. Strategic Planning Team
 - Manageability
 - Inclusivity
 - Microcosm
 - Goodwill
4. First Planning Session
 - Cardinal Features**
 - *1. Beliefs
 - *2. Mission
 - *3. Parameters
 - *4. Objectives
 - *5. Strategies
 - Formative Features**
 - 6. Internal Analysis
 - 7. External Analysis
 - 8. Competition
 - 9. Critical Issues
5. Communication of Draft Plan
 - Organizational Awareness
 - Public Awareness and involvement
6. Action Teams
 - Participation and Balance
 - Trained Leaders
7. Action Plan Development
 - *10. Action Plans
 - Programs
 - Projects
 - Prototypes
8. Second Planning Session
 - Presentation of Action Plans
 - Preparation of Final Draft
9. Implementation Schedule
 - Phasing of Plans
 - Resource Allocation Plan
10. Board Approval

ACTION

11. Organizing to Action
 - Strategic Context
 - Concepts of Action
 - The Dimensions of Whole-Context Organization
12. Capacity Through Action
 - The Dynamics of Whole-Context Organization
 - Mutual Commitments and Expectations
 - Morphing Formations
13. Action Cluster Planning
 - Strategic Context/Intent
 - Kinds of Agency
 - Planning Process & Discipline
 - Discovery of Possibilities

PLANNING

14. Continuous Creation
 - Constant Emergence
 - New Realities
 - Evolving Design

PROPOSAL

This proposal is written as a script in order to impart a sense of continuity and timing. Both the Process (planning) and the Discipline (plan) are based on Strategic Planning for America's Schools and Strategics: The Art and Science of Holistic Strategy and its three areas of emphasis – **Strategic Thinking, Strategic Planning, and Strategic Action**. Of course, the components are severable, but, taken together, in the proper sequence; they constitute a single developmental project from idea to action. All aspects are subject to modification by mutual agreement.

OBJECTIVE

The objective of this project is two-fold:

- (1) To develop a strategic plan by which the district can continuously create systems to serve its unique, extraordinary purpose.
- (2) To ensure the dedication of all resources and energies to strategic intent through complete organizational alignment and systemization of site plans and action.

All planning activity will be characterized by:

- An uncompromising dedication to the best interest of students
- A commitment to honor all previous and current plans and planning activity
- Full involvement by members of the education system as well as the community
- Agreement-based decisions and plans
- Emphasis on measurable, observable objectives
- Accountability for performance effectiveness
- Continuous review and evaluation

PHASE I - THINKING

1. STRATEGIC THINKING – The Five Arenas of Strategic Thinking

(August, 2021)

This is actually a graduate level course, intended to ensure that in our planning we deal with *strategic issues* and make *strategic decisions*. Five arenas of Strategic Thinking are explained in very practical terms: 1) Definitions (corporate-management, institutional-administrative, and futuristic); 2) Cause vs. Condition; 3) Leaders vs. Leadership; 4) The Nature of Systems (control, life-span, kind, motivation); and Organizing to Action. While this may sound academic, it is not. This course actually deals with relevant aspects of your current situation. This session may include your staff as well as board members, or, at your discretion, only members of the strategic planning team.

PHASE II - PLANNING

2. COMMITMENT AND PREPARATION FOR PLANNING

(August, 2021)

Two very important activities must be conducted by the district:

- a) An Internal Facilitator(s) will be trained to assist in the development of the district's strategic plan, to coordinate action planning, and to facilitate school/site plans. **(See attached flier for September Program/Phoenix, AZ)**
- b) The Superintendent should ensure a general awareness throughout the district and community regarding the strategic planning process. Personal presentations and/or other forms of communication may be used to reach all constituents. Dr. Gunn will meet with the Superintendent and Board for an Awareness Session.

3. BUILD STRATEGIC PLANNING TEAM

(August, 2021)

This is the Superintendent's prerogative and responsibility. He will be assisted by the district internal facilitator(s) in constituting a team with the following characteristics:

- Manageable; no more than thirty.
- Inclusive of all levels and functions within the school system.
- Reflective of all values and perspectives in the larger community.
- Having a disposition of good will – willing to make agreement-based decisions.

It is recommended that at least half the team be community members, that is, other than school personnel. Cambrian has extensive experience in building such teams and will be happy to provide advice upon request.

4. FIRST PLANNING SESSION

(September, 2021)

The strategic planning team will meet, in a retreat environment, for the initial three-day planning session. The vital statistics of the district and community, along with existing district plans, will be available for their consideration. During the first session, the team will develop the following Cardinal Features of the draft plan based on agreement.

- **Beliefs** (The unequivocal expression of fundamental values, convictions, and character.)
- **Mission** (A clear, definitive statement of highest aspiration including unique identity, specific purpose, and critical attributes.)
- **Parameters** (Strict pronouncements that establish the boundaries, limits, and rules within which the mission is to be accomplished.)
- **Objectives** (The desired measurable, observable, or demonstrable results that realize the mission.)
- **Strategies** (Largely stated initiatives through which the mission and objectives are to be achieved.)

In addition, the team conducts extensive analysis of critical Formative Features:

- Internal Factors (Strengths, Weaknesses and Organization)
- External Analysis (Conditions and Circumstances)

- Competition (Any provider of the same or similar good, products, and services to the same general clientele.
- Critical Issues (The convergence of internal and external factors that impends crisis.)

5. COMMUNICATION OF THE DRAFT PLAN

(September, 2021)

Immediately following the first planning session, the Superintendent will communicate the draft plan to the various publics. Special presentations will be made to the Board, Administrators, and auxiliary organizations. With each presentation, invitations to serve on Action Teams will be extended.

6. BUILD ACTION TEAMS

(October, 2021)

An action team will be formed for each strategy. Each team will reflect a cross-section of the school system and the community. The Superintendent will designate a leader for each team. Once the team leaders are chosen, a Cambrian Associate will conduct action team leader training. This is an intensive one-day session that prepares the leaders to facilitate the development of action plans. Detailed action planning guidebooks will be provided, resources identified, and communication/support protocols established.

7. DEVELOP ACTION PLANS

(November, 2021 – February, 2022)

This activity will require three to four months. The district internal facilitators will provide the direct coordination and support for this phase of the planning process, with continuing support from Cambrian. Cambrian facilitators will conduct, in addition to the initial training, regular, on-site review sessions with the action team leaders and internal facilitators. Their progress will be assessed, support and assistance provided as needed. The intent is to insure that they develop action plans that are not only relevant to their strategy, but also positive in terms of return on investment. All plans, must be implementable – not merely plans to plan. And each must be accompanied by a cost-benefit analysis.

8. SECOND PLANNING SESSION

(March, 2022)

This two-day session involves the strategic planning team in the assessment of the plans developed by the action teams. On the first day, the action team leaders will formally present their plans, and will answer questions posed by the members of the planning team. After all the presentations have been made, the strategic planning team will begin assessment of the plans and, on the second day, will render one of four dispositions for each plan: accept, reject, accept with stipulations, or return for more work.

9. PREPARE IMPLEMENTATION SCHEDULE with RESOURCE ALLOCATION PLAN

(April, 2022)

The strategic plan with all its attendant action plans will be implemented over a number of years. And, of course, it is the Superintendent who will make the final recommendations regarding timing and resource allocation. The planning team's recommendations will be immediately formatted and turned over to the Superintendent, who, working through necessary processes, will develop a five-year scenario of implementation. This will go forward with the plan as it is submitted to the Board for approval.

10. BOARD APPROVAL

(April, 2022)

Approval of the plan will be accomplished under the direction and guidance of the Superintendent. Cambrian will, however, gladly provide advice and counsel, in addition to that already included in the Internal Facilitator's Manual and training upon request.

PHASE III –Action

11. ORGANIZING TO ACTION - Strategic Organization

12. CAPACITY THROUGH ACTION – Capacity Development

(May, 2022)

If a strategic plan is to be carried into action, there are two major commitments that must be made: 1) the development of the capacity to insure implementation and 2) organizational alignment with the district’s strategic intent. Both can be accomplished through Mutual Commitments and Expectations that:

- Align all jobs and programs within the district with the strategic intent;
- Determine best use of time for all administrators, and
- Infuse the action plans into the specific job accountabilities of individual administrators.

This will be accomplished under the direction of a Cambrian facilitator based on 50 participants (principals, assistant principals, district office personnel). We are recommending (and budgeting) that the training be scheduled as follows: the group will attend a two-day session, with follow-up by correspondence. Each administrator will re-conceptualize his/her job responsibilities in terms of the strategic plan, identify results, and establish specific objectives within the context of district support. The format and process establish the basis for continuous evaluation of both district and individual performance. We are budgeting for only one session, but others may be scheduled if desired.

13. ACTION CLUSTER PLANNING - SCHOOL (Site) PLANNING

(Summer, 2022)

Campus leaders will be trained in each school (2-day program) which will replicate the process and discipline of the district. We recommend a team from each school be trained to include the principal and a facilitator. Each school/site will be prepared to develop a unique plan in the context of the District plan.

PLANNING

14. CONTINUOUS CREATION

Annual Updates are not reflected in the proposed budget, but typically are priced at 60% of the initial cost of the strategic planning process (Steps 2-10). (Proposal upon Request)

PROPOSED BUDGET – Decatur Public School District 61

Fees include materials, communication, document preparation (as needed), consultation and coaching. Travel expenses will be invoiced as incurred.

PHASE I

Strategic Planning Awareness

1 day @ \$4,000.00 \$ 4,000.00

Strategic Thinking Program/Planning Team

30 participants @ \$500.00 \$15,000.00

PHASE II

Strategic Planning Internal Facilitator Training Program

(See attached Program Flier – July 13-16 or
November 8-11, 2021) \$ 1,995.00/person

Strategic Planning

Steps 1-10
\$34,850 Total billed in 2 installments
(60% after First Planning session and
40% after Second session) \$35,850.00

PHASE III

Strategic Action –

Organization to Action and Capacity through Action

Steps 11, 12 – Mutual Commitments
And Expectations
2 days @ \$4,000.00

\$ 8,000.00

PHASE III

Strategic Action – School/Site (Fall, 2018-Winter, 2019)

Action Cluster Planning

(School/Site Planning Training Program) Step 13

2 per 19 school/sites

38 Site Participants and 3 Central Office

41 total @ \$500.00/person

2-day Session

\$20,500.00

Our services qualify for Title I funding.

AGREEMENT

We agree to the proposal as outlined on the preceding pages.

Raytown C-2 School District

Signature

Title

Date

The Cambrian Group



Signature

William J. Cook, Jr. Ph.D., President

Title

July 2, 2021

Date

William J. Cook, Jr., Ph.D.

Founder and President

THE CAMBRIAN GROUP

Since 1977, Dr. Cook and his Associates have facilitated strategic plans for 1,450 systems of education and trained more than 16,000 facilitators of strategic planning. In addition to U.S. school districts of all sizes, demographics, and economic circumstances, clients include state administrator and school board associations, state departments of education, American international schools, as well as ministries of education in other countries.

His book, Strategic Planning for America's Schools introduced strategic planning to education in 1986 and has become a standard text for college courses. His most recent books are STRATEGICS: The Art and Science of Holistic Strategy; THE EVOLVING CORPORATION: A Humanist Interpretation; UNENCORPORATING EDUCATION: Teaching and Learning in a Free Society. His most popular monographs are: "When Reform Becomes the Status Quo", and "Leaders vs. Leadership." He is a frequent speaker on state and national conferences. Two of his speeches on education have been published in the Congressional Record.

A native Alabamian, he holds a Bachelor of Arts degree from Jacksonville State University and a Master of Arts degree and a Doctor of Philosophy from Auburn University. A distinguished military graduate, he served three and one-half years as a Regular Army officer; his last assignment was company commander in an air mobile division. After the army, he served as assistant vice president and associate professor at Auburn University (at Montgomery). In addition, he is active and served on several non-profit boards and advisory councils in higher education.

His experience in strategic planning includes:

- The creation and accreditation of a new four-year state university with a 500-acre campus -(Auburn University Montgomery)
- The positioning of private companies for public offering
- The creation of holding companies (U.S. and abroad)
- Moving companies from NASDAQ to NYSE
- Planning and training for National and Provincial ministries of education, health systems, and aviation
- Strategic Planning for numerous commercial enterprises in manufacturing, banking, public utilities, insurance, retail, entertainment, real estate development, energy, as well as religious denominations
- Two years' study at the Planning Center, American Management Association.

He is a member of several academic and professional societies (including Sigma Tau Delta, Phi Kappa Phi, Scabbard and Blade). In 1986 he was named a Distinguished Professor of the National Academy of School Executives.

Judy Wallace and Bill have been married for 59 years. They have three daughters and five grandchildren.

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THE CAMBRIAN GROUP

E. Lindsey Gunn, Senior Associate

Lindsey is a Senior Associate with The Cambrian Group.

A native of Arkansas, Dr. Gunn completed a Bachelor of Arts in Education degree in mathematics at the University of Mississippi where he also lettered as equipment manager for the Ole Miss Football program. While serving in a variety of youth ministries in the Dallas area, he completed a Master of Arts degree at Dallas Theological Seminary. Subsequently, he earned both a Master of Education degree in guidance and counseling and a Doctor of Philosophy degree in higher education at the University of North Texas.

Dr. Gunn has conducted training sessions on strategic planning throughout the United States and abroad. He has facilitated strategic plans in over 100 districts and organizations in 25 states and three countries.

Internationally, he has worked with several groups in the Cayman Islands, British West Indies, including Cayman Airways, Cayman Ministry of Health, and the Vision 2008 team. He has presented Strategic Planning training programs in Spain, Nova Scotia, and Ontario.

During his nineteen year career in the Plano Independent School District, a large suburban school system in north central Texas, he served as high school math teacher, high school and senior high school guidance counselor, senior high school assistant principal, district research and planning analyst, and district director of quality improvement. As Director of Quality Improvement, his primary focus was the district's strategic planning process, school improvement process and Total Quality initiatives. He also conducted numerous staff workshops and directed several special projects.

Dr. Gunn and his wife, Mary, live in Oxford, Mississippi.

THE CAMBRIAN GROUP

References

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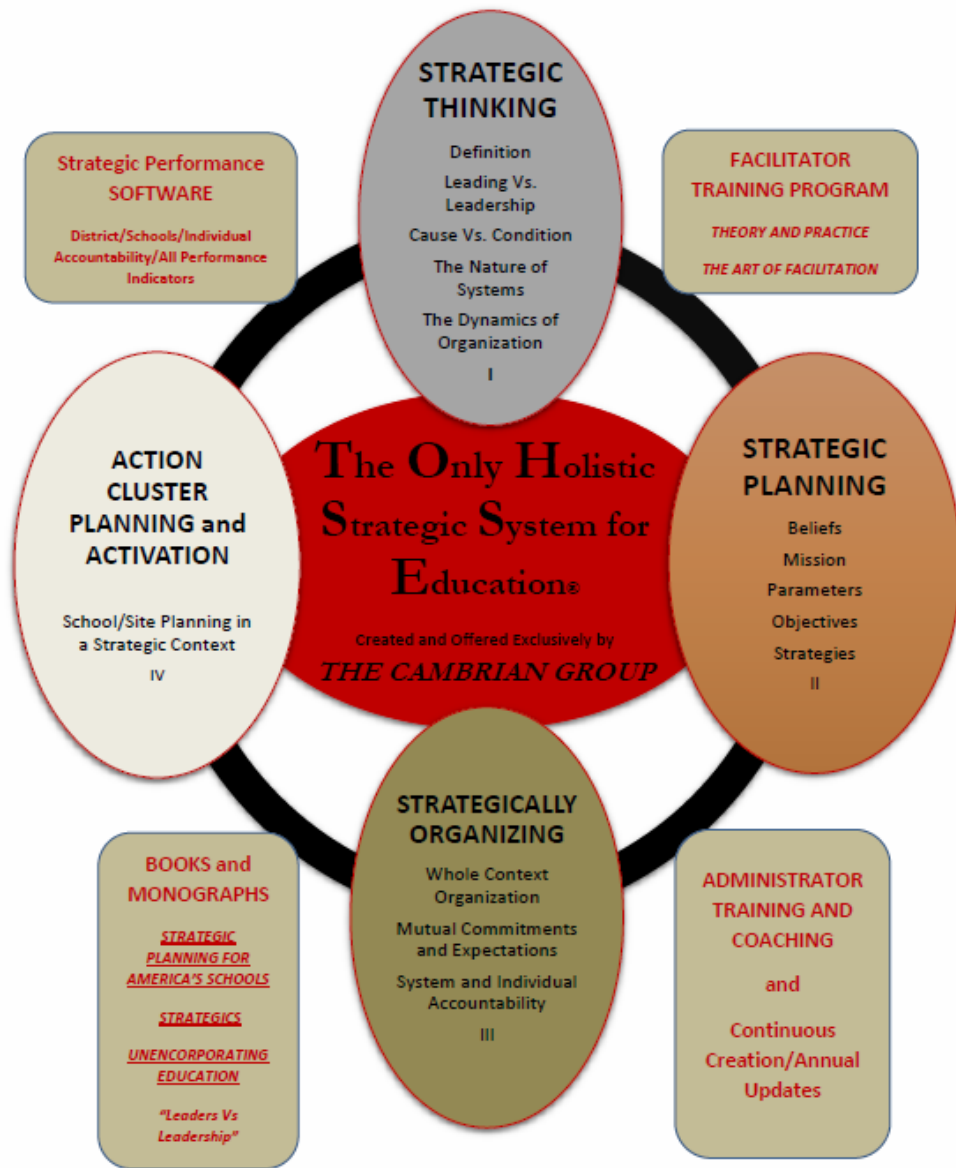
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To Whom It May Concern:

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No other individual or organization is authorized to use this material or to provide the services described therein.



William J. Cook, Jr., Ph.D.
Founder and President