I. INTRODUCTION

A. Background

Lake Bluff School District 65 (the “District”) is a high performing K-8 school district that serves a total community population of approximately 9,000 individuals, 3,000 households, and 869 students enrolled in the 2012-2013 school year. The District serves a student population that is 18 percent racial or ethnic minority and 9 percent low income. District students reside in the Village of Lake Bluff, a small community in the Northern Chicago suburbs, as well as in unincorporated Knollwood. District facilities include two school buildings and one administrative center.

The District prides itself on high standards and providing a safe learning environment with teachers who provide quality instruction for all students. The District has also demonstrated a commitment to its students’ future through recent investments in facilities and technology. Despite great success, the District is facing the constraints of tight economic times, state mandates, and potential legislation on the horizon. However, the District has the positive climate, high-quality employees, and financial resources to meet these challenges.

In order to continue improving the quality of education and services provided by the District, and with a profound sense of commitment to the District’s school community, the Board of Education has undertaken a thorough approach to future planning. During the 2012-2013 school year, the District partnered with ECRA Group, Inc. (“ECRA”) to develop a Strategic Plan to document the current state of the District and determine a future direction based on stakeholder values through rigorous research methodology and statistical analysis. The Strategic Planning Process included extensive outreach with all stakeholders invited to participate in both focus groups and surveys. Community member, parent, District employee, and student input provided the base data that shaped the District’s Strategic Plan.

The Strategic Plan is intended to provide a framework for future decision-making that builds upon a common mission, vision, and guiding principles held by the District community. The process has utilized a broad spectrum of data to result in a Strategic Plan that reflects a shared consensus of stakeholders and serves as a foundation for future decision making.
B. The Strategic Planning Process

- Conduct Board of Education individual interviews.
- Conduct focus groups with various stakeholder populations (District administrators, school administrators, faculty, staff, parents, community members, and students).
- Review current mission, vision, and guiding principles of the school district.
- Review archival data and reports provided by the District.
- Administer surveys of key stakeholder populations (Administrator/faculty/staff, parent, and community).
- Perform rigorous analysis of student achievement data.

- Facilitate Board work sessions.
- Document the mission and vision for the District and guiding principles for future decision-making.
- Develop the strategic plan document to serve as a broad outline to guide direction for the school district. The Strategic Plan contains:
  - Mission, Vision, and Guiding Principles
  - Research Findings
  - Strategic Goals
  - Objectives

- Facilitate administrator planning meetings.
- Develop the Implementation Plan which contains the following:
  - Objectives
  - Tactics
  - Metrics
  - Timeline
  - Resources
- Develop District dashboard to monitor progress toward goals.
C. Structure of This Report

The model to the right is a visual representation of the strategic planning model used in the District’s Strategic Planning Process. It identifies the engagement processes designed to address the development of various components of the strategic plan. To this point, the Board of Education, along with other district stakeholder groups, in partnership with ECRA have participated in a process aimed at identifying strategic goals and objectives designed to achieve the desired future position of the District.

The strategic plan document contains the first four components that represent Phase I and II. The mission was reviewed and a vision for the future and guiding principles for decision-making emerged. Data were collected and synthesized in the context of the District’s mission, vision, and guiding principles and articulated into research findings. Strategic goals were extracted from the research findings with consideration for the vision and guiding principles. Finally, a process aimed at understanding the strategic goals and the current state of reality resulted in the development of a set of objectives to accomplish the goals.

Moving forward, the Strategic Implementation Plan will be developed. As the model suggests, it is the role of administration to develop the tactics and implementation plan to accomplish the objectives and how the plan will be executed.

Contained in this document is an overview of the research, data sources, data synthesis, and research findings that went into the development of the Strategic Plan. The document also contains components of the strategic plan itself, including Mission, Vision and Guiding Principles, Research Findings, Strategic Goals, and Objectives.
D. Definitions

The following definitions provide context to the components of the Strategic Plan.

**Mission, Vision, & Guiding Principles:** the organization’s reason for being, its aspirations, core beliefs, and philosophies.

**Research Findings:** the current state of reality in the context of the mission and vision.

**Strategic Goals:** statements that reflect the desired future position of the organization.

**Objectives:** leverage points and strategies necessary to accomplish the strategic goals while staying true to the mission and values.

**Tactics and Implementation Plan:** specific steps and timelines necessary to implement each of the objectives.

**Execution:** the information systems necessary to monitor adherence to tactics and action plans.
# II. RESEARCH FINDINGS

## A. Data Sources

The following tables show the data sources ECRA used to develop the components of District 65’s Strategic Plan.

<table>
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<td>District 65 Strategic Plan (2009)</td>
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<td>Strategic Partnership Committee Report</td>
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<td>District 65 Curriculum Guides and Maps</td>
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<td>Parents (279 completed)</td>
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<td>Community Members (126 completed)</td>
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<th>Interviews and Focus Groups**</th>
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<td>• Curriculum Review</td>
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*Archival data provided by the District

**Focus groups consisted of approximately 200 total participants
B. Research Findings

In Phase I of the Strategic Planning process, data was collected through individual Board of Education member interviews and focus groups open to community members, parents, employees, and middle school students. In addition, electronic surveys were made available to the entire District community (N≈9,000, n=126), all District parents (N=533, n=279), and all District employees (N=135, n=116). The District allocated significant resources to outreach throughout the process.

Once data was collected, ECRA rigorously analyzed, synthesized, and triangulated the data to identify re-occurring themes and trends, which are reflected in the research findings. The guiding principles, strategic goals, and objectives contained in this report were developed based on these findings. Findings are summarized below and include the specific data sources and documents containing evidence to support each finding. Details related to cited evidence can be found in a separate document titled, “Strategic Plan Supporting Evidence.”

Global Finding
District 65 is a high achieving school district and should be recognized for its commitment to academic excellence and addressing students’ social and emotional needs. Eighty-seven percent of District employee respondents and 79 percent of parent respondents believe the District emphasizes students’ social and emotional development, and District students score consistently high on standardized assessments such as ISAT.

Over 80 percent of District employee and parent respondents agree District teachers provide quality instruction. Students benefit from the opportunity to learn and grow in a community with many resources, ranging from laptops for all middle school students to a new elementary school. The Board of Education, District employees, and parents are focused on continuing to improve student outcomes.

Evidence
Strategic Plan Supporting Evidence. Sections: Board Interview Summary, Focus Group Summary, Stakeholder Survey Analysis (Community members (N≈9,000, n=126), parents (N=533, n=279), and employees (N=135, n=116)), Achievement Analysis, and Curriculum Review. (N=population, n=sample).
Mission, Vision, and Guiding Principles

Over 80 percent of District employee and parent respondents as well as 69 percent of community member respondents support the current mission statement, which is as follows:

“The Mission of Lake Bluff School District 65, working in partnership with the community, is to educate our students to be lifelong learners and well-rounded citizens by addressing the unique needs of students and challenging their potential through excellence in teaching in a safe, nurturing learning environment.”

However, some community member, employee, and parent respondents would like the statement to be more concise; while some employee and parent respondents would like the mission to be more fully realized throughout the District with greater attention to academic rigor. Community member respondents would also like to see greater emphasis on fiscal responsibility in addition to academic rigor. In the desired future, over 80 percent of each community member, employee, and parent respondents would like to see the District ensure high academic standards for students, hire and retain quality teachers, and provide a safe environment.

Evidence
Strategic Plan Supporting Evidence. Sections: Board Interview Summary, Focus Group Summary, and Stakeholder Survey Analysis (Community members (n=126), parents (n=279), and employees (n=116)).
Student Achievement and Academic Standards

Student achievement is examined through three lenses: raw status, adjusted status, and growth. Raw status is examined by comparing the percent of students who meet or exceed state ISAT standards to the percent of students who meet or exceed standards across Illinois. Students within the District achieve high academic standards, with 94 percent of students meeting or exceeding standards on ISAT in reading and math compared to 81 percent of students across Illinois.

Adjusted status is examined by comparing the percent of students who meet or exceed ISAT standards compared to the percent of students attending districts with similar student populations (as defined by rates of mobility, income status, IEP prevalence, and English Language Learner designation) who meet or exceed state ISAT standards. Compared to Districts with like student demographics, students in District 65 experience expected academic performance.

Growth is examined through the use of a state-wide ISAT Growth Model. Through the model, each student’s prior year performance is examined to determine each student’s propensity for future achievement. To evaluate growth, students’ actual ISAT test scores are compared to the expected values provided by the prediction model. Results from the model indicate consistent individual student growth across District schools and grade levels in core content areas during the 2011 to 2012 school year compared with state-wide growth, with the exception of higher than expected growth in 6th grade reading and lower than expected growth in 7th grade math. Over the same period of time, students with IEPs and low income students achieved lower than expected growth in math; while female students and students who were Asian, multiracial, or American Indian/Alaskan Native achieved higher than expected growth in reading.

Overall, 92 percent of District employee respondents and 78 percent of parent respondents are satisfied with the academic quality throughout the District; however, community member, employee, and parent respondents also desire additional rigor for all students.

Evidence

Strategic Plan Supporting Evidence. Sections: Board Interview Summary, Stakeholder Survey Analysis (Community members (n=126), parents (n=279), and employees (n=116)), and Achievement Analysis.
Curriculum and Instruction

Over 80 percent of employee and parent respondents are pleased with the quality of the District’s curriculum and instruction; while only about half of community member respondents are pleased with the same survey item. Community members, parents, and employees widely praise teachers for their work and dedication. Employee and parent respondents also appreciate the District’s current emphasis on students’ social and emotional needs.

Some aspects of the District’s current curriculum are well developed; however other subject areas and grades require additional attention. Certain aspects of the curriculum, including math and science, are described as weak by employee and parent respondents. Community member and parent respondents expressed a desire for an emphasis on individualized instruction and differentiated learning in the classroom. Additionally, parent respondents would like to see greater encouragement of each student to meet his or her highest potential.

Evidence

Strategic Plan Supporting Evidence. Sections: Board Interview Summary, Focus Group Summary, Stakeholder Survey Analysis (Community members (n=126), parents (n=279), and employees (n=116)), Achievement Analysis, and Curriculum Review.

88% of District 65 employee respondents agree the District provides quality programs and curriculum.

83% of District 65 parent respondents agree District teachers provide quality instruction to students.
Alignment

Employee respondents identify curricular and instructional alignment as an area for improvement throughout the District. The curriculum in certain subject areas and grades are aligned and provide adequate guides for teaching; however many areas could benefit from additional attention. Employees are eager to align instruction and curriculum with the Common Core standards. Greater alignment of initiatives with the District’s mission, vision, and guiding principles will help focus the future direction of the District.

Evidence
Strategic Plan Supporting Evidence. Sections: Focus Group Summary, Stakeholder Survey Analysis (Community members (n=126), parents (n=279), and employees (n=116)), Achievement Analysis, and Curriculum Review.

Human Resources

One of the most frequently mentioned strengths of the District is its employees; and most employee respondents agree the District is a great place to work. Community member, employee, and parent respondents would like the District to prioritize the hiring and retaining of quality teachers, with greater employee accountability seen by community member and parent respondents as a means to accomplish this priority. Overall, employee respondents are satisfied with the District’s professional development offerings, but teacher respondents identify room for improvement. Employee respondents describe their ideal professional development program as one related to their specialized teaching areas, District initiatives, and technology. Some employee respondents also identify the need for time for collaboration built into the day.

Evidence
Strategic Plan Supporting Evidence. Sections: Board Interview Summary, Focus Group Summary, and Stakeholder Survey Analysis (Community members (n=126), parents (n=279), and employees (n=116)).
Assessment
Most employee respondents agree District students are prepared for state testing (86 percent); while parent respondents are less likely to agree about their student’s preparation (63 percent). Although state and national District rankings are important to community member and parent respondents, improving student achievement on standardized test was identified as a lower priority by community member, parent, and employee respondents when they were asked to rank their priorities. Employee respondents also identify room for improvement in the use of assessment data to improve instruction and effectively identify students who need special services.

Evidence
Strategic Plan Supporting Evidence. Sections: Focus Group Summary, Stakeholder Survey Analysis (Community members (n=126), parents (n=279), and employees (n=116)), and Assessment Practices

Instructional Technology
The District has made substantial investments in technology. In addition, efforts to integrate technology into the curriculum have begun. Parent respondents generally agree technology is used effectively in District classrooms; however, the need for a more comprehensive plan that includes systematic integration in classroom instruction and professional development is acknowledged by employee respondents.

Evidence
Strategic Plan Supporting Evidence. Sections: Board Interview Summary, Focus Group Summary, and Stakeholder Survey Analysis (Community members (n=126), parents (n=279), and employees (n=116)).
**Information Infrastructure**

Just under half of employee respondents agree that the District makes research based decisions, and when asked to expand, a common concern was the lack of infrastructure necessary to make comprehensive use of data currently available in the District. The Board is committed to measuring student growth, which can be supported through the use of data. In addition, community member, employee, and parent respondents express a desire for greater input in decision-making, transparent communication, and monitoring the impact of financial allocations, all which can be addressed by a more fully developed information infrastructure.

**Evidence**

Strategic Plan Supporting Evidence. Sections: Focus Group Summary, Stakeholder Survey Analysis (Community members (n=126), parents (n=279), and employees (n=116)), and Achievement Analysis.

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**Culture, Collaboration, and Communication**

Parent respondents are proud of their schools and employee respondents agree the District is a great place to work. The culture is student-based, with community member, employee, and parent respondents’ highest priorities revolving around high standards and a safe environment for students. However, there is room for improvement in parent and community involvement and transparent communication with the community. Many employee respondents also desire transparent communication. In addition, employee respondents desire greater access to the District Board of Education and administrators as well as greater opportunities to collaborate with peers. Teachers, parents, and the larger community are seen as positive influences and partners in the education process.

**Evidence**

Strategic Plan Supporting Evidence. Sections: Board Interview Summary, Focus Group Summary, and Stakeholder Survey Analysis (Community members (n=126), parents (n=279), and employees (n=116)).
**Facilities**
District employees and students benefit from a relatively new elementary school, and overall employee and parent respondents agree District facilities are well maintained. However, some community member, employee, and parent respondents raised safety and space concerns including building access, health concerns related to the middle school basement, and the use of outdoor areas. Community member, employee, and parent respondents want the District to prioritize providing a safe environment for students and employees.

**Evidence**
Strategic Plan Supporting Evidence. Sections: Board Interview Summary, Focus Group Summary, and Stakeholder Survey Analysis (Community members (n=126), parents (n=279), and employees (n=116)).

**Finance**
The District has an adequate tax base and high bond rating. Among survey respondents, 66 percent of parents and 17 percent of community members agree that the District is fiscally responsible. Many community member respondents desire greater fiscal efficiencies. Nonetheless, community member, employee, and parent respondents rate providing the lowest cost education as a lower priority. The Board is concerned about the effect future state legislation and mandates may have on the District’s financial health and ability to maintain programming.

**Evidence**
Strategic Plan Supporting Evidence. Sections: Board Interview Summary, Focus Group Summary, and Stakeholder Survey Analysis (Community members (n=126), parents (n=279), and employees (n=116)).
III. MISSION, VISION, and GUIDING PRINCIPLES

A. Mission Statement

Based on stakeholder feedback gathered through Phase I of the strategic planning process and during the Board of Education work sessions in Phase II, a revised mission statement is provided below.

District 65 Mission Statement

To provide a premier educational foundation that enables each student to thrive.
B. Vision Statement

Based on the research and findings and Board of Education work sessions, the following vision statement was developed to reflect the future success of Lake Bluff School District 65. The Vision Statement articulates a common vision for what the District hopes to become.

**District 65 Vision Statement**

Excellence in Education, Enthusiasm for Life, Every Student, Every Day.
C. Guiding Principles

Based on the research and findings and Board of Education work sessions, the follow guiding principles were developed as a collective set of main beliefs and values to guide the District’s planning and decision-making.

District 65 Guiding Principles

We believe:

- The best interests of students must guide every decision.
- Education is a partnership involving parents, students, school staff, and the community.
- Social and emotional wellness is integral to the learning process.
- Fine arts are fundamental to an exceptional educational experience.
- Our facilities and technologies must enhance the educational process.
- Students learn best when they are actively engaged and individually challenged to achieve their unique potentials.
- Excellence in teaching promotes excellence in learning.
- Fiscal discipline strengthens our schools and community.
- Effective and transparent communication with all stakeholders is essential for the district’s success.
- Continuous improvement requires data-driven evaluation and decision-making.
IV. STRATEGIC GOALS AND OBJECTIVES

The goals in this section have been categorized into four strategic areas that emerged through the research phase of the strategic planning process. The Board of Education achieved consensus around the four main goal areas and provided preliminary approval for the objectives listed under each goal. However, objectives may change throughout Phase III as the administrative team develops the implementation plans, which will include tactics, execution metrics, responsible people, timelines, and resource allocations.

**Strategic Goal I: Maximize the academic achievement and personal growth of each student.**

By supporting high academic standards and differentiated instruction, students can and will succeed.

**Strategic Goal II: Optimize the teaching and learning environment.**

Through a robust, challenging curriculum and high-quality teachers, instruction and facilities, the District can best support student achievement and development.

**Strategic Goal III: Ensure long-term fiscal stability and efficiency.**

Budgetary discipline and careful planning sustains high academic quality.

**Strategic Goal IV: Engage all stakeholders through effective communication and collaboration.**

Enhanced community relationships and partnerships foster cohesion and enrich students’ learning experiences.
IV. STRATEGIC GOALS AND OBJECTIVES (continued)

Strategic Goal I: Maximize the academic achievement and personal growth of each student.

By supporting high academic standards and differentiated instruction, students can and will succeed.

Objectives:

1. Monitor, assess, and improve individual student growth.
2. Hold students to the highest academic standards.
3. Identify and place students appropriately in challenging courses, programs, and interventions.
4. Encourage each student to meet his or her highest potential by focusing on individual learning needs.
5. Equip students with 21st century learning skills.
6. Refine and continue the District’s emphasis on students’ social and emotional development.
7. Offer and encourage a broad range of educational experiences.

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1 Student growth: the increase in student academic knowledge over a span of time.
2 21st century learning: a framework for teaching and learning that embraces 21st century skill outcomes, a relevant and applied curriculum, informative assessments, a social and emotional connection, a culture of creativity and innovation, and 24/7 access to tools and resources.
IV. STRATEGIC GOALS AND OBJECTIVES (continued)

**Strategic Goal II: Optimize the teaching and learning environment.**

Through a robust, challenging curriculum and high-quality teachers, instruction and facilities, the District can best support student achievement and development.

**Objectives:**

1. Align the curriculum and instruction vertically\(^3\) and horizontally\(^4\) in accordance with the Common Core.
2. Support successful student transitions to high school.
3. Develop and document clear guides for teaching within the curriculum.
4. Make use of assessment data to improve the quality of instruction.
5. Provide employees with relevant professional development opportunities.
6. Recruit, retain, and recognize high performing faculty and personnel.
7. Create equitable accountability systems District-wide that drive higher student achievement and improved educational outcomes for all students.
8. Systematically integrate technology in classroom instruction.
9. Create emotionally and physically safe, healthy, sustainable, and high-quality learning spaces.

\(^3\) Vertical alignment: agreement in curriculum, instruction, and assessment between grade levels to support successful transitions and matriculation.

\(^4\) Horizontal alignment: agreement in curriculum, instruction, and assessment across a single grade level.
Strategic Goal III: Ensure long-term fiscal stability and efficiency.

Budgetary discipline and careful planning sustains high academic quality.

Objectives:

1. Prioritize the allocation of District resources in alignment with the strategic goals.
2. Establish a board policy that sets minimum and maximum fund balances including mechanisms to bring balances back in range.
3. Evaluate programs for effectiveness based on return-on-investment and intended outcomes.
4. Develop a District facilities plan that addresses but is not limited to safety, space concerns, and land use.
5. Establish metrics to monitor District financial health.
6. Focus on the execution of prioritized initiatives.
7. Develop a long-term, comprehensive, and prioritized plan to guide spending.

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5 When writing the implementation plan for this objective, please consider addressing enrollment, facility needs, curriculum needs, technology, staff, debt planning, and the reserve study.

6 When writing the implementation plan for this objective, please consider addressing future facility needs, safety, accessibility standards, appropriate learning environment, maintenance costs, and land use.
Strategic Goal IV: Engage all stakeholders through effective communication and collaboration.

Enhanced community relationships and partnerships foster cohesion and enrich students’ learning experiences.

Objectives:

1. Develop and support strategies that foster open communication for both internal and external stakeholders.
2. Regularly collect and report stakeholder input for continuous improvement.
3. Provide relevant, targeted, and transparent information to the community.
4. Foster collaborative relationships to reinforce a sense of community and enhance student learning.
5. Develop learning opportunities beyond the classroom.
6. Maximize communication effectiveness through use of available technologies.
V. NEXT STEPS

The administrative team will create an implementation and execution plan. This will include finalizing the objectives as well as developing tactics, action plans, and metrics to monitor progress towards strategic goals.