

Vision and Strategy

Service Overview

Koru Strategy Group’s approach to visioning and strategy supports executive and senior leaders of school systems and education organizations who are charged with driving change and leading strategic initiatives with ambitious impact goals. We facilitate a guided process for leadership teams to articulate an aspirational vision for the future, assess needs, identify high leverage priorities, and get organized for how they will operationalize and achieve their strategic vision and priorities. Our hope is to establish a more intentional, inclusive, and proactive approach for planning and implementing strategic initiatives, helping teams gain clarity around their big goals and how they will align their most important resources -- people, time, finances -- to achieve them.

Below we have outlined the key phases of our visioning and strategy approach; each phase culminates in deliberate community and stakeholder engagement to ensure meaningful collaboration. A sample scope of work with detailed services aligned to outcomes and suggested timelines follows.

Prepare	Envision	Plan	Enact
Customize and confirm scope of work and participants	Create a shared vision for success	Get clear on specific goals and strategic priorities for the coming year*	Enact strategic action plan with ongoing support
Set purpose and understand context	Define impact, select evidence sources, and identify success criteria	Develop a strategic action plan with key performance indicators	Regularly collect and analyze evidence to assess and adjust
Establish norms and structures for collaborative work	Engage in current state vs future state analysis; identify the gap and make the case for change	Organize to operationalize: create a clear internal division of responsibility and project plan with milestones	Engage in improvement / design work*
Identify and onboard key stakeholder groups	Incorporate stakeholder voice in visioning and needs assessment	Engage stakeholders meaningfully in the strategic action plan	Involve stakeholders in ongoing progress check-ins

**Note that during the visioning and needs assessment phase, leadership teams often surface aspects of their leadership practice that need improvement (strengthen an existing practice) and/or innovation (design something new that is not yet in place or re-design something that requires transformation). Please follow the links for more information on our [continuous improvement services](#) and [design thinking](#) services.*

Sample Scope of Work

We develop and customize each scope of work to be responsive to the needs and priorities for each partner. The scope process begins with listening and learning so we can ensure our services are aligned to your desired outcomes and are responsive to your context, timeline, budget, stakeholders, etc. The sample scope of work below is based on a recent engagement and is intended to be flexible and provide options for engaging in either a series of meetings or half-day retreats; it can be modified and adjusted for each unique partner.

When	What	Services Aligned to Outcomes
Month 1	<p>Prepare</p> <p>Establish a strong foundation</p>	<p>Services:</p> <ul style="list-style-type: none"> • Conversations as needed to clarify and confirm purpose, people, process, and budgets • Kick-off meeting to establish strong relationships and norms/structures for working together • Support for inviting community stakeholder groups to participate, including email templates, talking points and scripts, information about the commitment, and meeting agenda templates <p>Outcomes:</p> <ul style="list-style-type: none"> • Confirmed scope of work, signed contracts, completed participant roster, scheduled activities • Strong relationships, shared understanding of scope of work and desired outcomes, shared norms for collaborative work • Key external community and stakeholder groups identified and onboarded to participate in the work
Month 2	<p>Envision</p> <p>Visioning and Needs Assessment</p>	<p>Services:</p> <ul style="list-style-type: none"> • Facilitate a series of three 90-minute sessions OR a half-day retreat focused on visioning and needs assessment to identify strategic priorities • Support to engage community stakeholder groups in needs assessment and visioning and to collect public comment and input <p>Outcomes:</p> <ul style="list-style-type: none"> • Leadership team gets grounded within the larger context of their district/state/organization and their team's purpose and responsibilities within it • Leadership team articulates a clear vision for success in 3-5 years and articulates a theory of action • Leadership team identifies impact criteria and collects data and multiple sources of evidence to inform current and future state analysis • Community stakeholder input has been incorporated into vision and needs assessment
Month 3	<p>Plan</p> <p>Action Plan and Division of Responsibility</p>	<p>Services:</p> <ul style="list-style-type: none"> • Facilitate a series of three 90-minute sessions OR a half-day retreat focused on strategic action planning and getting clear and concrete on process, timeline, milestones, internal division of responsibility, and engagement of key stakeholders

		<p>Outcomes:</p> <ul style="list-style-type: none"> ● Leadership team builds upon strategic priorities to develop a strategic action plan with milestones for the coming school year and a plan of ongoing assessment of progress based on evidence ● Leadership team gets clear and concrete about internal division of responsibility and how they will collectively and individually enact their strategic action plan ● Leadership team determines need for a systems-level, leadership-focused, evidence-based improvement process (Data Wise Improvement Process) and/or an empathy-based innovation and design process (design thinking)* ● Stakeholders are involved meaningfully and intentionally in the plan
Months 4-10	Enact	<p>Services:</p> <ul style="list-style-type: none"> ● Facilitate monthly 60-minute check-ins during the academic year to support teams in operationalizing and enacting their plans ● Provide a flexible bank of hours for consulting services and supports as needed for thought partnership, problem-solving, communicating with key stakeholder groups, and other emergent needs <p>Outcomes:</p> <ul style="list-style-type: none"> ● Leadership team enacts their strategic action plan, documenting progress and evidence of impact ● Stakeholders receive ongoing communication re: progress and are consulted as needed for feedback, problem-solving, etc. <p>Options:</p> <ul style="list-style-type: none"> ● <i>Leadership team engages in a Data Wise improvement cycle, documenting progress through their journey including key milestones to improving an area of their leadership practice related to their strategic action plan</i> ● <i>Leadership team engages in a design thinking innovation process to build, test, and scale a solution to a design challenge related to their strategic action plan</i>

Current and Recent Visioning and Strategy Projects

We are proud to have partnered with higher education leadership teams, district executive cabinets, school instructional leadership teams, regional service providers, and other education organizations to help teams engage their communities, meet learner needs, and design and scale innovative solutions to their problems of practice. Recent work includes:

- **Baltimore City Schools (MD)**

During SY20-21, Koru supported a group of 12 district leaders from City Schools in a strategy, design, and planning process to develop a coherent plan for a district-wide culture and process for collaborative data inquiry. Outcomes included a clear vision, purpose, and process for strengthening the district's approach to collaborative data inquiry and continuous improvement,

and a timeline and project plan for engaging schools across the district in a phased roll-out of professional learning to learn and launch a common practice and approach across ~130 schools. We are currently in the planning phases of supporting ongoing work over the next three school years as City Schools enacts this strategic plan with Koru as a professional learning partner.

- **Christina School District (DE)**

Since SY21-22, Koru has supported the Deputy Superintendent and the Teaching & Learning Team during their summer planning retreats and ongoing monthly collaborative time through facilitated visioning, strategy, improvement, and design sessions. These services were designed to help the team of leaders new to their roles shift away from urgent and reactive work to a more intentional and proactive approach to leading teaching and learning. As the district shares a new Strategic Plan, the Teaching & Learning Team, led by the Deputy Superintendent, will ground their team's purpose and priorities within the strategic plan and engage in a series of sessions to define impact, assess needs, and organize for meaningful change and improvement.

- **Hartford Public Schools (CT)**

Over three school years, Koru served as an implementation provider for the Harvard Data Wise Project at HGSE, supporting leadership teams from the HPS central office and across all 40+ schools to advance the district's strategic priorities around data and literacy. Our work has included planning and strategy sessions with a district steering team and several central office and executive teams to lead a coherent approach focused on the district's goals of improving literacy across all grade levels and content areas and building capacity for using data effectively to inform decisions and improve instruction. Koru has also led long-term capacity-building through both 1:1 coaching/mentorship and professional learning communities for ten individuals selected by the district to earn formal coach certification for purposes of sustaining and scaling functional data teams and effective instructional leadership across HPS.

Contact Us

For pricing, detailed information, and to further explore a partnership, contact Carolyn Chen, Chief Relationship Officer, at cchen@korustrategy.com