

Kirsten Stewart:

Hello Connect Canyons listeners. Welcome back. [crosstalk 00:00:03]

Speaker 2:

Thank you.

Kirsten Stewart:

Have you ever sat in the main office of your child's school? Just sat there, observing and listening to the comings and goings? The steady stream of students needing to check in or check out. Parents dropping by with permission slips and fee payments. The assistant principal radioing instructions to the custodian in preparation for an assembly. It's a lot to juggle, but schools are practiced in the art of juggling. And most often it all goes according to plan, until it doesn't. In a year when everything was upended by the COVID-19 pandemic it may seem counterintuitive for Canyons District to launch into a strategic planning exercise, but we've never shied away from doing the right thing because it's hard.

Kirsten Stewart:

In a bid to keep student achievement and innovation at the forefront of our mission and vision, the Canyons Board of Education has hired the consulting firm Education Elements to assist the Board and administration with creating and implementing a new strategic plan to carry us forward into the next decade. I recently had the opportunity to sit down with a representative from the consulting firm to ask how, in a world where change is the only constant, can you plan and ensure that plan stays relevant? She had some great insight and explained that the key is planning for change instead of planning for perfection.

Kirsten Stewart:

This is Connect Canyons, and I'm your host, Kirsten Stewart, here today to talk about strategic planning. What is a strategic plan? Why is it important and what does creating one entail? Here with me to talk about all of these questions and more is Shelby McIntosh, managing partner of the consulting firm, Education Elements. Welcome to Canyons District, Shelby.

Shelby McIntosh:

Thank you, thanks so much for having me.

Kirsten Stewart:

Let's start by having you share a bit about yourself, I understand you were once a teacher. What got you interested in education consulting?

Shelby McIntosh:

Yeah, great question. You know, I think I became really interested and passionate about education in my own educational experience. I grew up in a town that was incredibly diverse racially, socioeconomically. And it was pretty clear to me that education had a big impact on the opportunities that individuals had. And that was something that was really interesting to me, I grew really passionate about it. Random fact, I actually went to school to be a pilot. Don't really know why, that was a childhood, kind of, fantasy dream. But, uh, but very quickly fell into education and wanted to be a teacher. English teacher specifically. And got my start in the classroom in North Texas, taught high school for about six years, and

during that time I dabbled with being a principal, with doing some leadership positions, and realized how hard that work was (laughs) and thought, "You know, I don't know if this is for me, but I know that I want to make an impact in a bigger way."

Shelby McIntosh:

And through my graduate program, I really fell in love with policy. And so shortly after I left the classroom, moved to Washington, DC, got involved in federal education policy, became a researcher. That's when I got my doctoral degree in education policy. And that was really interesting. I think that provided really my foundational knowledge for the industry. But it just moved far too slow. And I really wanted to see change happen quicker. And that's what brought me to consulting.

Kirsten Stewart:

All right, well, fast moving change certainly describes the world we live in, so I can appreciate your passion for finding ways to help schools navigate that. I don't know how competitive the education consulting space is, but what would you say sets your company apart?

Shelby McIntosh:

I think a lot of what determines the kind of consulting you get in education is the size of the company. And something that I really like about our organization is we're small enough that we still customize all of our work, depending on where we're going. That was really important to me, I didn't want to go to a company that was so big that I felt like I had to take kind of a cookie cutter way of doing things and apply it everywhere I went. So we're really boutique in that way, where we get to customize, we get to really learn about the places where we work. And put a solution together that we think is going to fit there. It makes it hard, 'cause, you know, (laughs) every project requires a lot of work around the customization. But it's what makes it most fulfilling, and I think makes us feel like we're really able to make an impact there.

Kirsten Stewart:

So I guess you could call it bespoke education consulting and planning.

Shelby McIntosh:

And, you know, we didn't start in strategic planning. I think that's important to know about us. We started in personalized learning, actually. Very focused on instructional practices. But it was clear that a lot of the work we were doing at the classroom level required a level of district strategy. So even in that personalized learning work, we were working with district leaders to think more broadly about a sustainable plan. And that's what really got us into strategic thinking, and then more broadly became kind of planning for the district overall.

Kirsten Stewart:

Okay. I want to dig into the details of strategic planning, but first, I'm curious. From your seat working with school districts around the country, what are some of the big issues they are seeking help with? You know, coming out of the pandemic, what have they learned about where education should be headed next?

Shelby McIntosh:

Yeah. It's a great question. You know, I think there's different ways to answer that. There's, "What are they thinking about right now, right in front of them?" Which is a lot of what you just mentioned, where parents, and students, and teachers are looking at this next school year and wondering what it's going to look like. And what's really interesting is we're hearing the word safety come up, but in a totally different way. You know, if I was doing strategic planning two years ago, safety was about facilities, and, like, physical safety of students. Now it's about health, and it's about mental wellbeing, and keeping our students and our staff safe in that way. And so, there's both immediate issues in terms of what will our protocols look like next year versus this year? And then there's bigger issues, which is just how do we, on a bigger level, care for the mental wellbeing of our students, and of our staff?

Shelby McIntosh:

I would say that's one big bucket. And then there are the things that we always hear about, which is, we want to make sure that our kids have opportunities when they leave our schools and that it's whatever opportunity they want. And so we're giving them a variety of different experiences while they are in middle school and high school. We're individualizing our approach to make sure they're getting the support that they need. That's always been there. I think now it's just, as we grow and as we learn, we're learning different ways to do that. And so we're planning for it in different ways. And then I would say probably that the third bucket, more broadly speaking but still very driven by the times, is the question of equity. You know, social justice is something that has very much driven our work over the past year and a half. And it certainly is showing up in strategic planning conversations as we think more about what it means to provide equitable opportunities for all of our kids.

Kirsten Stewart:

I didn't hear you mention technology, but maybe because technology is more of a tool, the means through which you tackle some of the big ideas you mentioned.

Shelby McIntosh:

Yeah, it's funny you say that. That is a good observation. I think it's because technology has become such a given. We almost can't do education (laughs) now without it. And, you know, maybe four, five years ago, we would have been talking about a more intentional focus on technology. Now it's a piece of everything. You know, it's not its own bucket anymore, it is something that shows up in all of the focus areas that come out of this kind of work.

Kirsten Stewart:

Okay. Let's talk planning. For some people the term strategic planning brings to mind a disciplined and thoughtful process that links the school system's mission with concrete strategies and tasks. For others the term conjures images of endless meetings and dusty three ring binders. How do you envision it?

Shelby McIntosh:

Really what I've learned from Education Elements, because I think maybe before the past two, three years, I thought about strategic planning in the more traditional sense. And honestly, I'm a planner as a person. You know, I love planning trips, and planning parties, and planning even my week. And so I would think about it in a very, "I get to plan things," kind of way. But I've learned at Education Elements that it's not about the plan, it is about the planning and the muscle that you build to be able to do that in a way that you can plan for change. And not have this vision of a perfect plan that hangs on your wall, or sits on your shelf in a binder, but rather we have built a process that we can continue to plan no

matter what comes at us. And this organization was doing that work long before COVID, but, you know, this past year has made us really double down on that strategy.

Shelby McIntosh:

That, really the end goal here is certainly we wanna have a product of our work. You know, we want to have something to show for what we've put into the time, but really what we're doing is building a practice. We want people to walk away from this process and feel like, "Okay, I know, I have a roadmap now for how I'm going to navigate the next five, 10 years. But I also know that in that roadmap there are going to be forks in the road. And now I have a set of ideas that are going to help me navigate that and make decisions along the way."

Kirsten Stewart:

As a District created by a vote of the people, Canyons has always prioritized innovation. It's baked into our DNA. How, as we start doing the hard work of strategic planning, can we ensure we're genuinely pushing to continuously improve?

Shelby McIntosh:

I think that is the key. I think it is that you're not just doing what you've always done. And we use a lot of design thinking for that. We've borrowed that from kind of the start-up tech industry because there's so much innovation, and they're constantly having to innovate in their industry. And we feel like education really should be doing the same thing. But where we see school districts and schools specifically get stagnant, it's when they just kind of repeat the same ideas over and over. It's really easy in strategic planning to sit down and just pick the things you're really comfortable with and that you know how to do and put them in your plan. Rather than taking a step back and thinking, "Is there a different way to do this? Is there a new thing we should be trying?"

Shelby McIntosh:

That's uncomfortable, and we tell people at the beginning, "This isn't going to feel great always, 'cause we're going to push you, we're going to make you think about things that you're going to want to say, 'But we do it this way.' And we're going to challenge you to say, 'But what if you didn't?'" And that's, I think, how you get to boosting student achievement, you know, keeping staff morale really high, really growing the expertise of your staff, is when you're innovating, which has become a word that is kind of cheapened now, but we really mean that. That we want to be doing new things and not just recycling what we've always done.

Kirsten Stewart:

You mentioned earlier that you have experience with stakeholder engagement. There are obviously a lot of stakeholders in education (laughs) from students, and parents, to teachers, administrators, and local and national leaders. The list goes on. How do you invite all these different groups to the table and make sure they feel welcome, included, and meaningfully involved?

Shelby McIntosh:

It's a great question. I mean, to me, this is the most important part of strategic planning, is getting your stakeholders involved. For a bunch of different reasons. I think the trust that is built between you, and your community, and all of your stakeholders when you go out and ask, "What do you think?" And then

you use their feedback and their input to actually make a decision. There is that bond, that relationship, that trust that is established there that every school district needs. So it's such a good opportunity for that investment in your relationship with your stakeholders. Not to mention, you know, the best plans are the ones that are really grounded in what they need and what is most important to them. And so we work really hard to make sure that we collect all of that, as much information as we can, that we get so many different perspectives on this. And make sure that that information leads our process and is constantly brought up and revisited throughout the whole planning process.

Shelby McIntosh:

But it's not easy. I'd be lying if I said it was easy. Even in the most engaged communities, people are busy, and they have lives, and it's hard to ask them to take, you know, a couple of hours out of an evening to come to a summit, or even just to sit down and take a 10-minute survey. It's hard. So our strategy is to try a lot of different ways. You know, we'll do some focus groups with very targeted groups of people. We will do something more broadly like administer a survey to try to get just those people who are willing to take a survey.

Shelby McIntosh:

You know, and we'll do more kind of public forum type of events. So I think diversifying our approach. And also going to where people are. You know, right? We don't want to create this burden of them having to physically leave where they are and come to us. We wanna go to them. We want to use the means that they're already using to communicate with the District, and try to just make it as easy as possible so that we're doing the work so that they can participate. Not them having to work to participate.

Kirsten Stewart:

I assume data gathering is also an important part of this planning process so that you can measure progress toward goals.

Shelby McIntosh:

Absolutely. Yeah. That comes back to that metaphor of a roadmap. That there has to be learning along the way, or you're just sort of floating along, you know. And so, having a really intentional plan for what information you're going to collect and how you're going to use that to make your decisions going forward is another critical part. I mentioned I'm a researcher, so the data part is really important to me and most recently we've been thinking about this like a theory of action. If we're going to make a decision, if we're going to put a strategy in place, let's be really clear about the outcomes we think that that strategy is going to create, identify some metrics that align with it, and then plan for when we're going to review those.

Kirsten Stewart:

Well, as you know, we're a fairly young organization, 12-years-old. And the first new school district to be created in Utah in 100 years. I'm curious, from your perspective, when is the right time for an organization like ours, or any organization for that matter, to undertake strategic planning.

Shelby McIntosh:

Ooh, that is a good question. I mean, I think it's almost like you know when it's time. You know, there are critical points in the life cycle of any school district. And I do feel like school districts go through life cycles, and you guys are at a really interesting one, you know, given your unique history and origin story. And you're kind of at this pivot point where it makes total sense, and you guys knew, "It's time, we need to plan, we need some direction." I think that feeling comes up for a lot of different reasons. For some districts it's because they're in a really challenging place. They're not achieving what they want to, they don't know why, and they realize they need some direction. For others, it's similar to you all where you've had a lot of success and you care deeply about maintaining that success, but feel like you don't really know what the next five, 10 years should look like. And so you need some direction.

Kirsten Stewart:

Let's talk about the timing for all this. How will all this roll out?

Shelby McIntosh:

We are going to spend the first three months, so say May, June, July, really studying the District, collecting a lot of information. We'll do a little bit of stakeholder feedback, but we're really going to hit that hard at the end of the summer when people start coming back from holiday or, you know, we lose a lot of people just physically in the summer. So we want to make sure again, that we're hitting them when we have the best success to get their feedback. That's usually at the beginning of the school year, that's when people are most engaged, right? And so, we felt like that would be a great time to really focus on stakeholder engagement. So that'll happen at the beginning of the school year. And then once we have all of that feedback collected, that's when we get into the real, like, planning part of it.

Shelby McIntosh:

One of our outputs of that community engagement is we want to have, we call them focus areas. But you could also call them priorities, or kind of the pillars of the plan. Once we have those identified, we actually put teams together around each one. So, you're... I'm about to go against what I said earlier, but you mentioned technology earlier. I said that's usually not a focus area anymore, but let's say that it is. We would put a team together just for that topic. And we would make sure it has some subject matter experts, some people from the community that represent important perspectives, and they would do planning just around that issue.

Shelby McIntosh:

So, most plans have anywhere from three to six focus areas. We put teams together around each of those areas. And that's when we take them through this whole design process. We get really innovative with a lot of big thinking. We do some research around other school districts, other organizations and try to inspire new ideas. We also bring in everything that we've learned at this first part. Things like what's working really well for the district, or some opportunities for improvement that we noticed in kind of our early study. And those planning teams use all that information to really put the nuts and bolts of the plan together.

Kirsten Stewart:

Once the focus area teams finish their work, what happens next?

Shelby McIntosh:

Once these planning teams get their ideas together we go back, we charge them to get feedback on those plans and to test them out in certain scenarios. So, they will have pretty detailed plans about who they need to talk to, and what kind of feedback they need to get. They might even, you know, be able to test things out in sort of a simulation, or simulation-type of environment. But, you know, they wanna get some feedback on their ideas before anything is final. And I'm using air quotes, you can't see it, but-

Speaker 2:

(laughs)

Shelby McIntosh:

... I say final with air quotes because it's never final. You know, it's always a living document. It's something that can and should change as the world changes and the needs of the school district change.

Kirsten Stewart:

Okay. I'm a Canyons District parent or employee. What should I be thinking about or preparing to contribute as a partner in this endeavor?

Shelby McIntosh:

I'm so glad that you're asking that, people can start thinking about it now (laughs). But it's a lot of, you know, strengths and weaknesses. You know, and we always try to put a structure in place but keep it really open so people can share what they came to share. You know, because when you show up at a focus group, conversation or at a community forum, or you open up the survey to take it, you have in your mind what you're ready to share. So we wanted to be open enough that we can hear that. But also, you know, give some structure to this is the kind of information we're trying to collect. I really love a metaphor we used with a district just a few weeks ago. We call it our sailboat metaphor, but we talk about your harbor.

Shelby McIntosh:

You know, where do you want your boat to go? Where do you want the district to go in a year, in three years, in five years? What does that harbor look like? How would you describe it? And then we'll get them to talk about their wind. What is the wind in your sails? What's gonna get you there? What are the strengths of the district that you're really proud of, that you feel like are resources we should be leveraging more than we are now? And then we talk about anchors and icebergs. And difference between those is anchors are things that you can pull up. You know, that you might drop in the water, it slows you down, but you can pull it right back up and keep going.

Shelby McIntosh:

Icebergs are things that are not going away, that are in our path and we have to figure out how to navigate around them. And that has led to some really interesting conversations with, certainly teachers, but parents, I would say community members even who don't have kids in the school. When they think about, you know, the role that the district plays in their community.

Kirsten Stewart:

This transcript was exported on Apr 27, 2021 - view latest version [here](#).

This has been so informative. We thank Shelby for taking time to break all this down for us. I'm sure this is not the last time we'll hear from her over the next six months. This is Kirsten Stewart, signing off on another episode of Connect Canyons.