

Strategic Planning Status Report

January 22 - March 1, 2021

To the CCSESA membership:

In an effort to keep the board and membership apprised of our firm's work since our last report in January, I trust this note provides a good overview of what we've been up to and what is still to come. It's been an intense and thought-provoking few weeks, culminating in the first meeting of the Planning Committee on February 26th. To engage all CCSESA members in the strategic planning effort, I'm hoping to be able to be at the regional meetings later this month. In the meantime, I am providing a written update of our work.

In a nutshell, we have:

- Continued to review **internal CCSESA documents**, paying special attention to budgets and fiscal policies, legislative agendas, governance and structure of the organization as well as its committees.
- Reviewed both CCSESA's **mission statement** and the mission/vision statements of all county offices as well as the mission/vision statements of many statewide education groups, and best practices for mission statements.
- Continued to observe **board and select committee meetings**.
- Conducted a total of **32 confidential one-on-one interviews** lasting between 60 and 120 minutes each, with **county superintendents** representing a broad cross section of CCSESA members (*see previous report for explanation of selection process*); prep work for each interview included research, development of appropriate questions, iterative development of new questions, logistics; after-interview work included review of notes, aggregate theme development, FTA debrief, common themes, ideas, issues, recommendations
- Facilitated **four COE Superintendent small group conversations** (with one final small group session scheduled for March). Upon completion of the March session, we will have met with all 58 superintendents.
- Conducted **12 confidential one-on-one interviews** with **education leaders**.
- Been scheduling **confidential one-on-one interviews** with **other external stakeholders and education policy influentials** (including journalists, leaders of education organizations, etc.) and with **heads of statewide organizations** that reflect county membership structures, for example CSAC (total external interviews anticipated to be approximately 25).
- Conducted one-on-one meetings with **2021 steering committee chairs** (and interviews with select prior chairs).
- Created a draft **"assumptions list"** to guide strategic thinking and create context for intentional planning, which the strategic planning committee is now reviewing (and which we plan to bring to

regional meetings in March/April); the assumptions fall into 7 categories: California, including population/demographics and economy; socio-political issues; education and schools (including early learning, special education, foster care, career tech ed, and juvenile justice); technology; health and safety; and county offices of education.

- Identified (and are continuing to expand) **recurring themes** from interviews and research, to form base for “findings” and for recommendations.
- Set meetings with other statewide membership organizations with similar structures to CCSESA to assess “**best practices**” for membership organizations and associations — paying special attention to communications, governance, committee structure, decisionmaking, etc.
- Designed and facilitated the first **strategic planning committee**¹ meeting — held on February 26 which focused on three major topics:
 - *Mission Statement — key words*
 - *Assumptions — creating a broad context into which CCSESA’s plans and goals need to fit*
 - *Findings — based predominantly, at this point, on research, observation, and interviews/ meetings with county superintendents (and a handful of external interviews)*
- Begun to schedule time to **meet with each region** (hopefully in March, depending on schedule); regional chairs should have received letters requesting time at the meeting and explaining the process.
- Planned presentations to enable **engagement with each region**.
- Begun to plan and design **second strategic planning committee meeting** for May.

Should there be questions, please feel free to reach me directly by email (fern@ferntiger.com) or phone (office: 510.208.7700 or mobile: 510.414.3627 — Note mobile is probably best).

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– The Planning Committee includes: LK Monroe, Debra Duardo, Lynn Mackey, Gayle Garbolino-Mojica, Mary Sakuma, Jim Brescia, Chris Hartley, Krystal Lomanto, Michelle Hutchins, Stacey Adler, Kermith Walters, Scott Nanik, Jim Berardi, Al Mijares, Tim Hire, Karen Stapf-Walters