



To: Merton Community School District Board of Education
Dr. Ron Russ, District Administrator
From: Brian Kammers and JoAnn Sternke, Excel Leadership
RE: Report on the Updated Strategic Plan: 2024-2029
Date: June 17, 2024

In September 2023, Excel Leadership was honored to be chosen by the Merton Community School District Board of Education to facilitate the update of your strategic plan. Since then, we have worked with a talented and dedicated Strategic Planning Committee to attain community voice from multiple community sources and craft an updated plan that reflects community input. We believe the updated plan will serve the school district well over the next five years. Members of the Strategic Planning Committee will proudly be presenting the updated strategic plan for your consideration on June 17.

The Strategic Planning Committee

Following input from the Board at an October 27, 2023 overview and planning session, we sought membership for a strategic planning committee to provide oversight to the plan creation and be key participants and ambassadors to guide the process. We recommended membership of 12-16 people with representation including parents, employees, community members, administrators, and the Board. [Applications](#) were submitted in October and early November. The Committee was formed and met for the first time in early December. The following members of the Strategic Planning Committee met nine times over the last six months and guided the strategic plan update process with commitment and care:

- Nicole Cotton, Board of Education
- Annie DePietro, Parent and Community Member
- Mary Jane Huber, Community Member
- Mary Iwanski, Teacher
- Rebecca Imes, Board of Education
- Melissa Musial, Parent and Community Member
- Steve Newcomer, Parent, Community Member, School Administrator
- Ashley Renz, Parent and Community Member
- Stacey Rice, Community Member, Teacher
- Ron Russ, Community Member, District Administrator
- Brian Vassak, Parent and Community Member
- David Wagner, Teacher
- Benjamin Wildmon, Parent and Community Member
- Jordan Zuercher, Parent, Community Member, District Employee – Maintenance & HVAC

Minutes were generated for all Strategic Planning Committee meetings and were shared with the District Administration, all Committee members, and the Board of Education. For transparency, all meeting agendas along with videotaped meeting summaries were placed on the school district's website noting work occurring at the following Strategic Plan Committee meetings:

- | | | |
|------------------|---------------------|--------------------|
| ● May 21, 2024 | ● March 5, 2024 | ● January 25, 2024 |
| ● May 7, 2024 | ● February 20, 2024 | ● January 2, 2024 |
| ● April 23, 2024 | ● February 6, 2024 | ● December 4, 2024 |

Strategic Planning Process Phases and Timeline

As presented to the Board of Education on October 27, 2023, the process to update the Merton Community School District Strategic Plan contained four phases:

1. Planning, Committee Formation, and Environmental Scan: October 2023 to December 2023
2. Collecting Community Input and Priorities: November 2023 to February 2024
3. Development of the Strategic Plan: January 2024 to May 2024
4. Plan Adoption and Action Plan Creation: June 2024 to July 2024

Highlight: Community Voice

It was clear that the Board of Education desired strong community voice in the update of this strategic plan. Because of this priority, we worked diligently to attain [community voice](#) in the process via:

- A. **Community Listening Sessions:** Fifteen (15) community [listening sessions](#) were held in December using a consistent SWOT Analysis questioning process to ascertain Strengths, Weaknesses, Opportunities, and Threats:
1. What are the strengths of the school district? What makes you proud here?
 2. What is key for this strategic plan to focus on to improve? What could the district do better?
 3. The school district wants to make sure all students are prepared for success when they leave here. What might the school district focus on to better serve all students?
 4. What might the school district focus on to better engage and retain staff?
 5. What might the school district do to better the community and engage with parents, staff, and the greater community?
 6. What is something that could threaten our ability to accomplish this strategic plan?
 7. What is something new the school district could try?
 8. Is there anything else you want to tell us to consider in the strategic plan?

Sixty (60) participants offered input at the community listening sessions (15 staff, 36 parents and community members, 5 administrators, and 4 Board of Education members). 550 comments were collected with [Key Themes](#) being analyzed by the Strategic Planning Committee in March 2024.

- B. **Community Survey:** In February 2025, we followed up with a community survey to attain increased community input and test key themes identified in focus groups. Over 300 people took this survey and offered input into the updated plan. Again, the Strategic Planning Committee analyzed and synthesized [Key Themes](#), and used this information to begin plan formation.
- C. **Information Hub on District Website:** To aid in community understanding, a section of the District website was identified to house updates and information. [Frequently Asked Questions](#), invitations, and communication were posted here to heighten community transparency.

Strategic Plan Format

As shared with the Board in October 2023, the Committee used the following format to build the updated strategic plan. We consciously did not update the wording of the Mission, Vision, and Values (MVV) identified in 2018 as this should be a constant “north star” for any organization. The focused work of the plan is updated, but the MVV is a beacon to strive to attain by focusing on the work of the pillars and supporting strategic objectives. The plans to support the MVV are updated using the following format and use examples from the MCSD Employee Experience pillar:

- **Pillar** = The Key Focus Areas of the Plan (e.g., *Student Experience, Employee Experience, Community Experience*)
- **Goal** = The long-term aspiration for this pillar (e.g., *For the Employee Experience pillar, the identified Goal is to “inspire and engage all employees to live our mission, vision, and values”*)
- **Strategic Objectives** = The sub-categories supporting the pillar; we will focus on these areas for five years but the work under it will change in each year (e.g., *The Employee Experience pillar has two Strategic Objectives: (a) to strengthen employee recruitment and retention, and, (b) to strengthen employee engagement*)

- **Key Performance Indicators (KPIs)** = Measures to monitor progress and impact for each Pillar (e.g., *For the Employee Experience pillar a few of the identified KPIs are: "Increase 10% overall Employee Satisfaction," and "Increase 10% overall Employees are likely to recommend the District for employment."*)
- **Action Plan Focus Areas** = The key work to focus on in the strategic objective area; this work may take more than one year to attain, but may not take five years; these annual areas may change during the course of the plan implementation (e.g., *For the Strategic Objective of "strengthen employee recruitment and retention" in the Employee Experience pillar, an action plan area is: "Provide a competitive, sustainable, and transparent compensation and benefits plan."*)
- **Annual Action Plans** = The annual work to be done in the Action Plan Focus Area on a yearly basis (e.g., *The work to of the Action Plan Area "Provide a competitive, sustainable, and transparent compensation and benefits plan" includes some of the following key actions in 2024-25: "Execute comprehensive wage study for all employee groups studying regional & area comparisons" and "Review/Revise employee recruitment processes."*)

A sample page from the Draft Implementation Plan (Page 9 of the 17 page document) demonstrates how this work cascades and becomes more and more specific. This is key in making the plan actionable.

Employee Experience Action Plan			
Strategic Objective 1: Employee Recruitment & Retention / Action Plan A: Comp/Benefits Plan			
Pillar Goal: Inspire and engage all employees to live our mission, vision, and values			
Strategic Objective 1: Strengthen employee recruitment and retention			
Action Plan A: Provide a competitive, sustainable, and transparent compensation and benefits plan			
Work to Be Done in 2024-25	Process Owner	Due Date	Complete
● Execute comprehensive wage study for all employee groups studying regional & area comparisons	Superintendent	February 2025	
● In 2025-26, implement a comprehensive and transparent wage plan	Superintendent	April 2025	
● Review/Revise employee recruitment processes	Superintendent		
● Share Comparative wage information	Superintendent		

Graphic of the Merton Community School District Strategic Plan

The graphic organizer on page 5 displays the key elements of the updated strategic plan in support of the Mission, Vision, and Values. In the diagram, you will see:

- **Mission, Vision, and Values:** Our north star – what we are aiming for
- **3 Pillars:** Student Experience, Employee Experience, and Community Experience
- **2 Strategic Objectives Supporting each Pillar:** These support the key themes identified in the listening sessions and strategic plan survey
- **Supporting Action Plans:** These action items organize and identify the annual work to be done each year in support of the strategic objectives
- **Foundation of the Plan:** The Finance pillar from the last strategic plan was deemed operational, yet important to the district's future success. As such, this commitment is a priority that is foundational to the plan. This

statement is key as the foundation: *The foundation of the Merton Community School District Strategic Plan is our commitment to fiscal stewardship and comprehensive planning to meet current and future needs.*

Merton Community School District Plan on a Page

Using this format, the Strategic Planning Committee began drafting a [Plan on a Page](#). This can be found on Page 6. Multiple Plan on a Page drafts were refined over the last months of committee work. This is a useful tool for placement on the website and for communication with the Merton school community.

Implementation Plan with Key Performance Indicators and Annual Action Plans

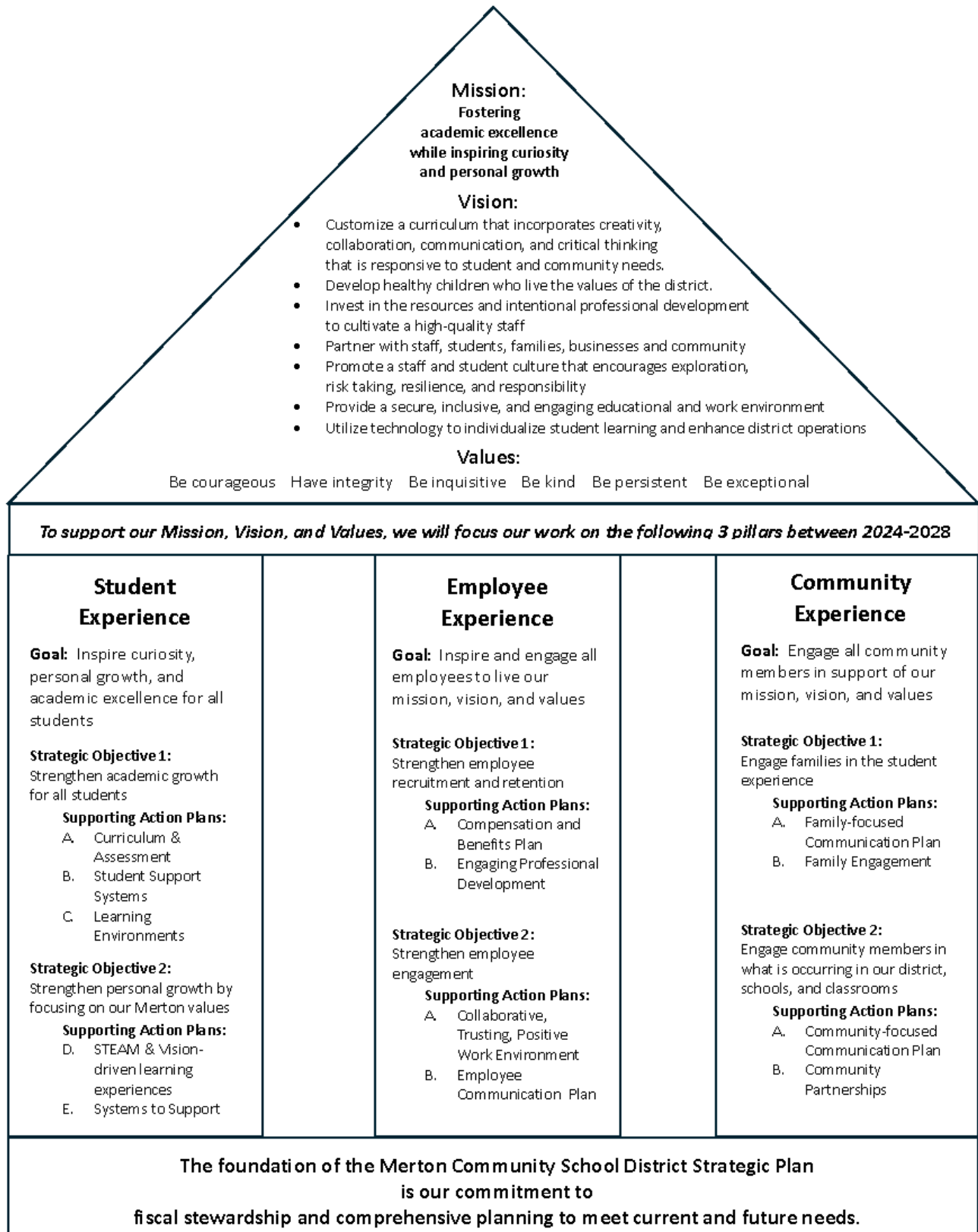
Pending Board approval, work will continue to finalize the [Strategic Plan Implementation Plan](#) which is currently in draft form. This key document is the work of the Administration, as they are the key implementers of the strategic plan. When you open and review the draft document, you will see it is a key progress monitoring tool, both in identifying the year's work to support the plan and in identifying key performance indicators (KPIs) which will be used to monitor plan impact. Draft KPIs can be found on pages 2, 8, and 13.

We will work with the school district leaders to complete the Implementation Plan and guide in creation of a plan to launch the plan in the school community at the Annual Meeting in September.

We have greatly enjoyed facilitating this update of the strategic plan. We would like to thank all members of the Strategic Planning Committee for their commitment and thoughtful insight. Their support of the school district is something you can be proud of.

This plan will serve the district well in the upcoming five years. We are confident it represents the key input from the community and the overall priorities for success.

Merton Community School District Strategic Plan 2024-2029



Merton Community School District - Strategic Plan on a Page

Our Mission of *fostering academic excellence while inspiring curiosity and personal growth* is supported by the following vision:

- Customize a curriculum that incorporates creativity, collaboration, communication, and critical thinking that is responsive to student and community needs
- Develop healthy children who live the values of the district
- Invest in the resources and intentional professional development to cultivate a high quality staff
- Partner with staff, students, families, businesses and community
- Promote a staff and student culture that encourages exploration, risk taking, resilience, and responsibility
- Provide a secure, inclusive, and engaging educational and work environment
- Utilize technology to individualize student learning and enhance district operations

We will support each other to live the values of our school community:

- Be courageous
- Be inquisitive
- Be persistent
- Have integrity
- Be kind
- Be exceptional

To support our Mission, Vision and Values, we will focus our work on the following between 2024-2029:

Student Experience

Goal: Inspire curiosity, personal growth, and academic excellence for all students

1. Strengthen academic growth for all students

- A. Develop and strengthen curriculum and assessment systems to support student learning
- B. Strengthen support systems to meet all students' academic needs
- C. Refine and evolve environments that support and enhance student learning and engagement

2. Enhance personal growth by focusing on our Merton values

- D. Nurture student curiosity with Science, Technology, Engineering, Art, and Math (STEAM) and other vision-driven experiences
- E. Strengthen systems to equip students to live the values of the district

Employee Experience

Goal: Inspire and engage all employees to live our mission, vision, and values

1. Strengthen employee recruitment and retention

- A. Provide a competitive, sustainable, and transparent compensation and benefits plan
- B. Invest in engaging professional development

2. Strengthen employee engagement

- C. Foster a collaborative, trusting, and positive work environment
- D. Strengthen communication with all employees

Community Experience

Goal: Engage all community stakeholders in support of our mission, vision, and values

1. Engage families in the student experience

- A. Implement family-focused comprehensive communication plan
- B. Support family engagement in their students' experience

2. Engage community members in what is occurring in our district, schools, and classrooms

- C. Implement a community-focused comprehensive communication plan
- D. Broaden business and community partnerships

The foundation of the Merton Community School District Plan is our commitment to fiscal stewardship and comprehensive planning to meet current and future needs.