

Executive Summary



Strategic Planning Phase 1 Report

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Introduction

Dr. Jill Underly, the State Superintendent of the Wisconsin Department of Public Instruction (DPI), announced in January 2023 that the department would engage in a strategic planning process. The DPI Strategic Plan aims to align the work of the agency and the needs of all learners in Wisconsin schools and libraries and will be effective from 2024-2029.

Purpose of the Report

Phase 1 of DPI's Strategic Planning Process took place between March 2023 and February 2024. The Strategic Planning Phase 1 Report describes the background leading up to the development of a strategic planning process and the first phase of the work. This report was created to ensure transparency in the strategic planning process, communication to internal and external audiences about timelines and activities, and to assist in setting expectations related to the work and outcomes.

Overall, there are three phases of the 2024-2029 DPI Strategic Plan process. Phase 1 is designed to obtain internal and external feedback to shape mission, vision, values, and priorities. Phase 2 aims to analyze data and refine elements from Phase 1, continue internal and external engagement, and the identification of goals and metrics. In Phase 3, DPI will identify strategies, and programs to achieve the priorities.

The Phase 1 Report begins with background about strategic planning generally; the formation, membership, and responsibilities of the Strategic Planning Committee; and then provides a detailed description of Phase 1 activities. Phase 1 activities included gathering input from a wide range of internal and external perspectives. Finally, a brief description of the transition to Phase 2 is described. A separate report providing an analysis of the data collected in Phase 1 will follow.

Summary of the Report

Formation and Charge of the Strategic Planning Committee

DPI staff were invited to apply to join the Strategic Planning Internal Steering Committee (Committee). The open selection process resulted in the committee representing staff with various perspectives and lived experiences. Led by Tacara Lovings from the Office of the State Superintendent (OSS), this committee also represents each DPI division.

The Committee's charter stated the three objectives of the Committee:

1. Leverage internal expertise and knowledge of internal colleagues.
2. Implement a shared governance approach; and
3. Provide leadership in the development, implementation, and communication of the strategic plan to internal and external audiences.

More specifically, the Committee was expected to co-lead internal and external engagement, offer advice and recommendations regarding the process of strategic planning, and provide regular updates to the Cabinet of DPI, as well as internal and external audiences. The Cabinet of DPI includes the State Superintendent, the Deputy Superintendent, the Executive Director of the Office of the State Superintendent, the Assistant State Superintendents, the Directors of the Human Resources, Policy, Budget, and Research Team, Education Information Systems, and the Office of Legal Services, and the Policy Initiative Advisors assigned to the Office of the State Superintendent. The scope of work included reviewing available data and information related to strategic planning, providing advice on design of internal and external engagement sessions and a survey, and direction on internal and external communication and partnerships.

Initial Activities of the Committee

Once the committee was formed, the Office of the State Superintendent (OSS) held an all-agency hybrid meeting. This meeting reviewed the commitment to strategic planning, introduced the Committee members, and created a space for DPI colleagues to ask questions. This event launched the Strategic Planning Feedback Form, allowing folks a

pathway to provide comments, suggestions, and to ask questions throughout Phase 1. Following the Strategic Planning Kickoff Event, the Committee began meeting bi-weekly.

Early on it was determined that the work would require an agreed upon definition of strategic planning. The Committee and Cabinet worked cooperatively to craft a definition of the strategic planning process, which is as follows:

“The Wisconsin Department of Public Instruction is developing a strategic plan that is rooted in equity to ensure that the strategies and measurements of progress align with DPI's mission and vision. We are committed to transparency and inclusivity, actively involving both DPI colleagues and external stakeholders in a collaborative process.”

Next, to prepare for the internal engagement sessions, the Cabinet collaborated with the Committee to create an updated vision and mission for staff. The new DPI mission and vision were shared with staff on July 25, 2023.

Vision: To advance equitable, transformative, and sustainable educational experiences that develop learners, schools, libraries, and communities in Wisconsin.

Mission: Engaged Learners Creating a Better Wisconsin Together

Another action step, based on feedback on the Strategic Planning Feedback Form, was to create a webinar to overview the responsibilities of DPI, titled, “SEA Responsibilities: What Legal Responsibilities Does DPI Have?”. These sessions were offered to DPI colleagues in June 2023. Laura Adams from OSS provided a technical overview of the minimum requirements of the agency to provide clarity around non-negotiable requirements and limitations of DPI. The intention was to help staff better understand where DPI has flexibility in determining activities of the department, and the specific actions that are required. The hope was that this foundational understanding would help staff better inform the priorities of the department.

Activities to Gather Input and Feedback

After the sessions on the responsibilities of DPI, the Committee developed internal engagement sessions to gather input from DPI staff. The Committee created the questions for the engagement sessions to be general and broad, inviting open feedback. The engagement session processes and questions were informed by the document, [Listening Session Toolkit](#), from the National Hospice and Palliative Care Organization (NHPCO), March 2022. The Committee members drafted the questions and provided edits and feedback. The Committee then used a consensus voting process to finalize the questions.

The questions were:

- What do you think is the most pressing issue facing schools and libraries over the next five years?

- What priorities would you like DPI to consider focusing on for the next five years?
- What ideas do you have to inform how the department can achieve these priorities?
- Thinking about the department today, what do you think DPI needs to start or stop doing?

Starting in September 2023, the Committee offered three virtual events and one in-person at GEF 3 for internal engagement. Attendance was optional but encouraged. The Committee engaged with specific teams in addition to the all-agency sessions, these intentional sessions were helpful to ensure Throughout this time, staff continued to be encouraged to complete the Strategic Planning Feedback Form as an additional way to provide input.

On October 3rd, 2023, the Committee shared an internal engagement session debrief with Cabinet members. This debrief included the number of participants and Strategic Planning Feedback Forms submitted, some initial results, next steps for additional analysis of the responses. Additionally, the Committee shared with Cabinet members recommendations and considerations of feedback from the internal engagement sessions that could and should be addressed expeditiously.

In addition to internal engagement sessions, the planning committee held 19 statewide external engagement sessions offered in person and virtually called Community Engagement Events. These events followed the same format and process of the internal engagement sessions. The Community Engagement Events took place in-person around the state between November 2023 and February 2024. The Committee partnered with local school districts to hold events at one of their district buildings. Additionally, virtual events were held throughout these months to capture as many participants as possible.

In addition to engagement sessions, the Committee created a strategic planning survey that was then used for both internal and external audiences. This survey was different from the Strategic Planning Feedback Form. The survey was longer, asked opinions on specific topics, and was designed to assist the department to reflect on the perspectives of a variety of audiences. These reflections will also be used in the creation of key priorities for the agency, the goals within the initiatives, and the data needed to show progress. The survey was open from November 2023 to February 2024. All people in Wisconsin were encouraged to complete the survey.

Transition to Phase 2

Members of the Committee met with Cabinet to mark the end of Phase 1 in March of 2024. Meetings between the Committee and Cabinet will continue to inform the leaders of the department on the priorities that should be selected for the final strategic plan. The Committee will continue to meet with Cabinet throughout Phase 2 and Phase 3. For more information about each phase, please visit the [Strategic Planning Webpage](#). The Committee remains committed to transparency, authentic engagement, and innovation to

advance equitable, transformative, and sustainable educational experiences within the department, and Wisconsin schools and libraries.

Conclusion

The Strategic Planning Phase 1 Report overviews activities in Phase 1 of DPI's strategic planning process. This report is essential to providing clarity of the process to both internal and external audiences. It reviews the tasks of the Committee. These tasks included gathering both internal and external feedback to shape the strategic planning process. A variety of engagement methods were used to help shape priorities aligned with the mission, vision, and values of the agency. In addition to transparency, it is clear the Committee reflected on the DPI Core Values throughout the work. This important work continues into Phase 2. A separate report describing data gathered from the various efforts of the Committee will follow.

To read the full report <https://dpi.wi.gov/strategic-plan/build-strategic-planning>.



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