

STRATEGIC PLANNING FOR SCHOOL BOARDS: DOING THE RIGHT THINGS

Prepared expressly for the Board Leadership Development Program

July 30, 2020

Agenda for the Training

- Welcome-Joe Guillen, NMSBA and David Chavez, CES
- What is a strategic plan?
- Why should your district have one?
- What is the process for developing an effective strategic plan for the district?
- Developing the vision and mission for the district: How does the district obtain community and staff input?
- Communication: How does the board communicate its expectations to the district?
- Using the strategic plan for your budget and to guide and approve new initiatives.
- Closing comments and evaluation

Special Guests at 2:30:

- Dr. Gene Schmidt, Superintendent, Farmington Municipal Schools
- Mr. Kyle Rhodes, Board President, Farmington Municipal Schools
- Dr. Kurt Steinhaus, Superintendent, Los Alamos Public Schools
- Ms. Ellen Ben-Naim, Board President, Los Alamos Public Schools
- Mr. Dwain Haynes, Superintendent, Eunice Public Schools
- NM Representative David Gallegos, Board Member, Eunice Public Schools

WHAT IS A STRATEGIC PLAN?

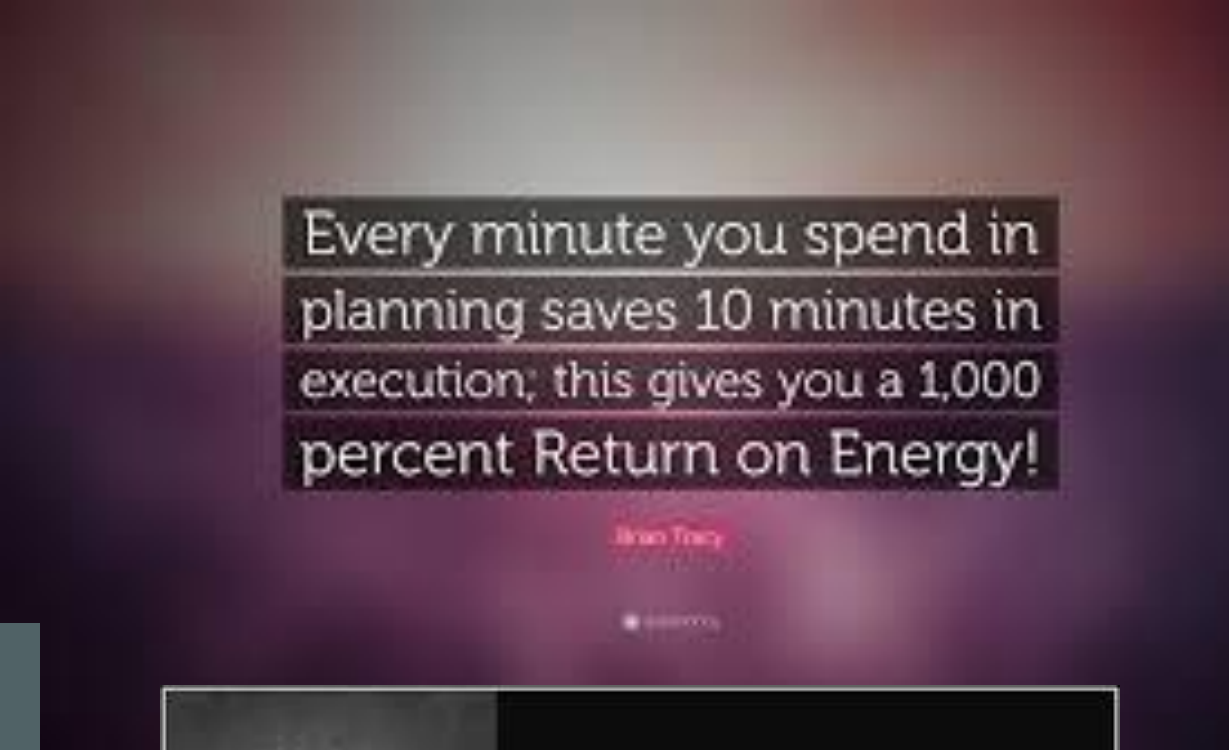


A Frame of Reference for Strategic Planning



"Plans are nothing; planning is everything."

-Dwight D. Eisenhower



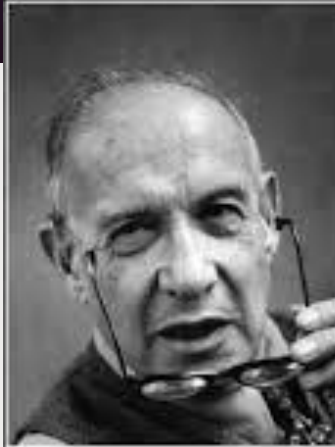
Every minute you spend in planning saves 10 minutes in execution; this gives you a 1,000 percent Return on Energy!

Brian Tracy

IF YOU PLAN FOR ONE YEAR, PLANT RICE. IF YOU PLAN FOR TEN YEARS, PLANT TREES. IF YOU PLAN FOR 100 YEARS, EDUCATE MANKIND.

CHINESE PROVERB

QuotePic.com



The best way to predict the future is to create it.

— Peter Drucker —

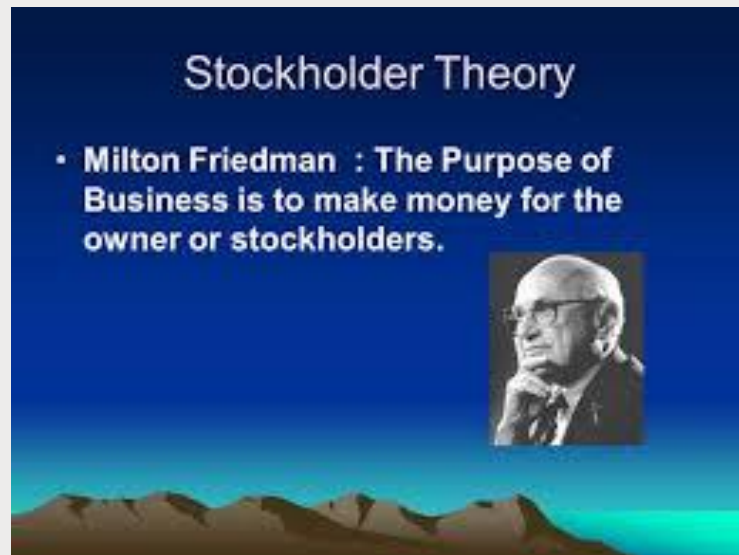
AZ QUOTES

Corporate Strategic Planning (compared to) Public/Non-Profit Strategic Planning

Corporate/For Profit

- Profit
- Return on investment to

stockholders



Public/Non-Profit

- Service
- Satisfaction of the

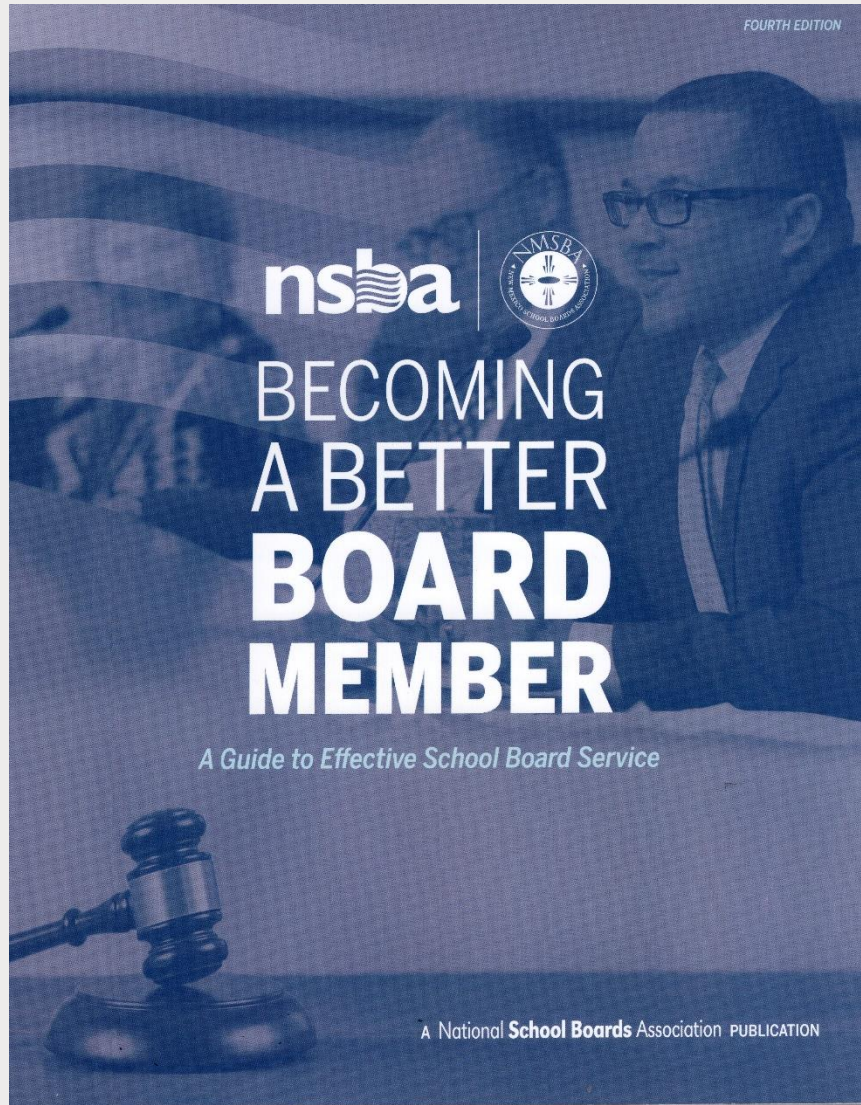
stakeholders



WHY SHOULD YOUR DISTRICT
HAVE ONE?



Becoming a Better Board Member



Chapter 4

EXERCISING BOARD LEADERSHIP

- CREATING A VISION
- ASSESSING NEEDS
- LOOKING AT YOUR COMMUNITY/DISTRICT
- IDENTIFYING TRENDS AND EMERGING ISSUES
- SETTING ACHIEVABLE GOALS
- IMPLEMENTING THE VISION
- POLICYMAKING

Why Plan Strategically?

- Incorporates all current planning initiatives--- “If you don't know where you are going, any plan will do.” [Peter Drucker](#)
- You are acting strategically when you plan for a desired future--- “Someone's sitting in the shade today because someone planted a tree a long time ago.” [Warren Buffett](#)
- Keeps the Board and administration focused on the right things--- “Management is doing things right; leadership is doing the right things.” [Peter Drucker](#)

What are the “Right Things” for a Board

- The “10,000 foot perspective”
- Planning and monitoring a district strategic plan
- Holding your superintendent accountable for executing your strategic plan through an effective evaluation system
- Reviewing, updating, and revising your strategic plan on a regular basis

Are you Planning Strategically or Tactically?

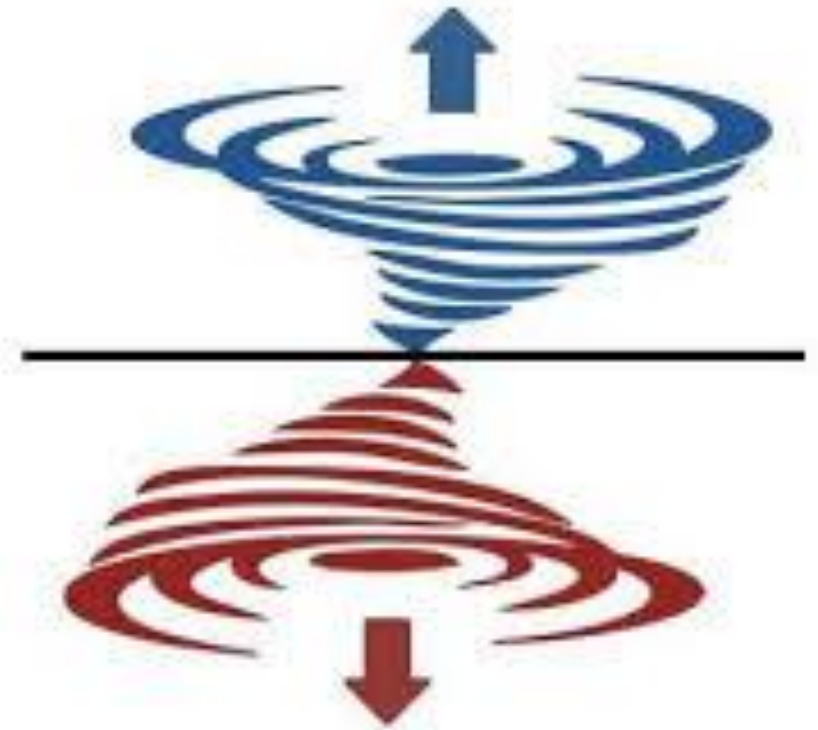
Tactical Planning

- Day to Day
- Annual Cycle
- Today's Challenges
- Present Oriented
- Doing Things Right
- Internal Focus

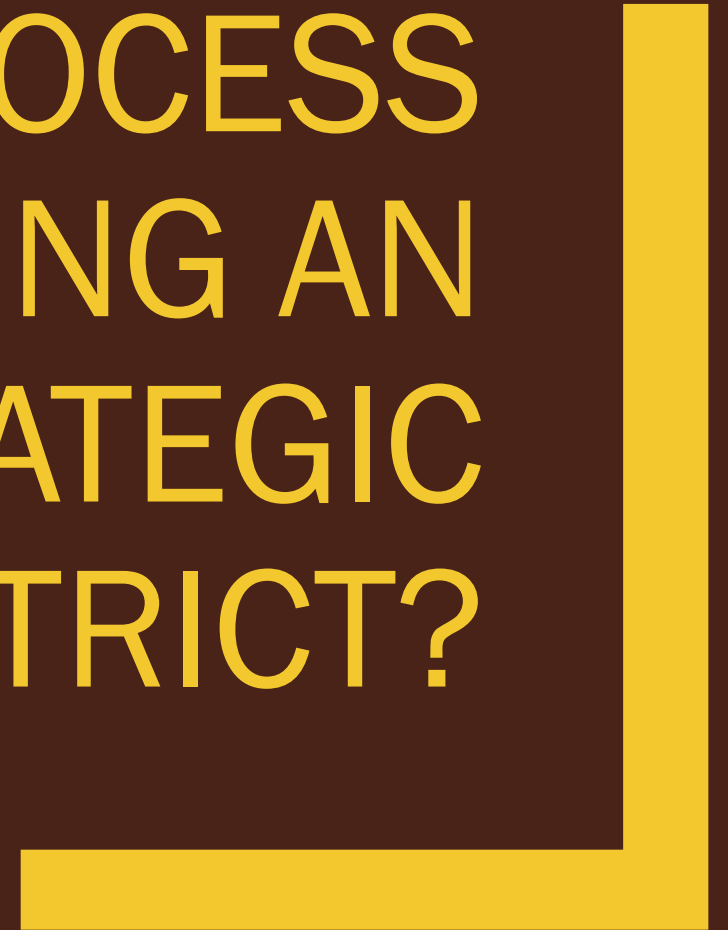
Strategic Planning

- Longer Term-3-5 Years
- Toward a Desired Vision
- Tomorrow's Opportunities
- Future Oriented
- Doing the Right Things
- Internal and External Focus

The Strategic Planning Cycle as an Upward Spiral (A Virtuous Cycle)



WHAT IS THE PROCESS
FOR DEVELOPING AN
EFFECTIVE STRATEGIC
PLAN FOR THE DISTRICT?



What's Involved for a School District to Plan Strategically? (Google John Bryson)

Plan to Plan

Validate Mission and Vision

Review Mandates

Conduct an environmental assessment (SWOT)

Identify the strategic issues or focus areas facing the district

Develop a set of SMART goals to address the strategic issues

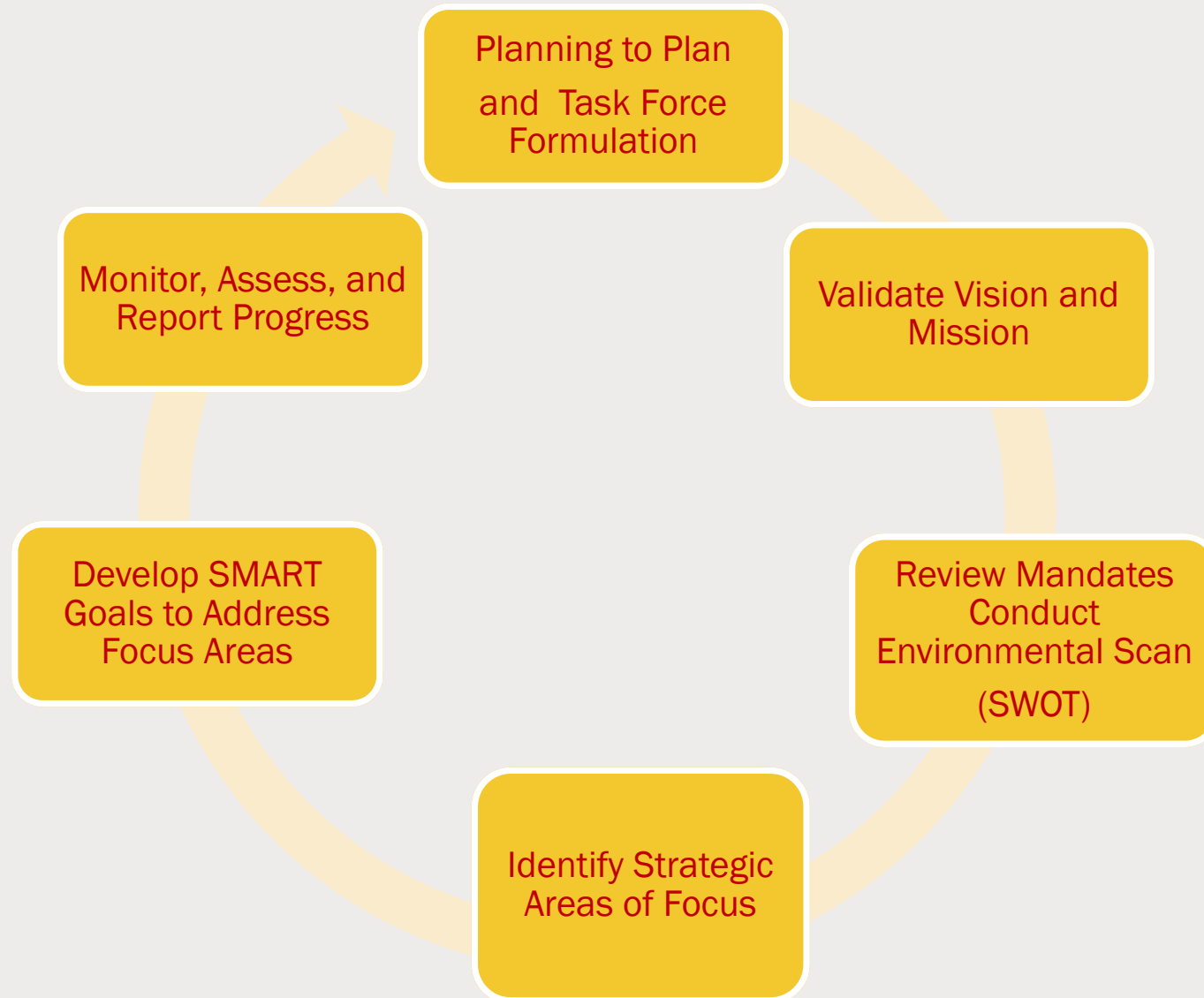
Monitor, adjust and modify (PDSA) as the plan is implemented

STRATEGIC
PLANNING
FOR PUBLIC
AND
NONPROFIT
ORGANIZATIONS

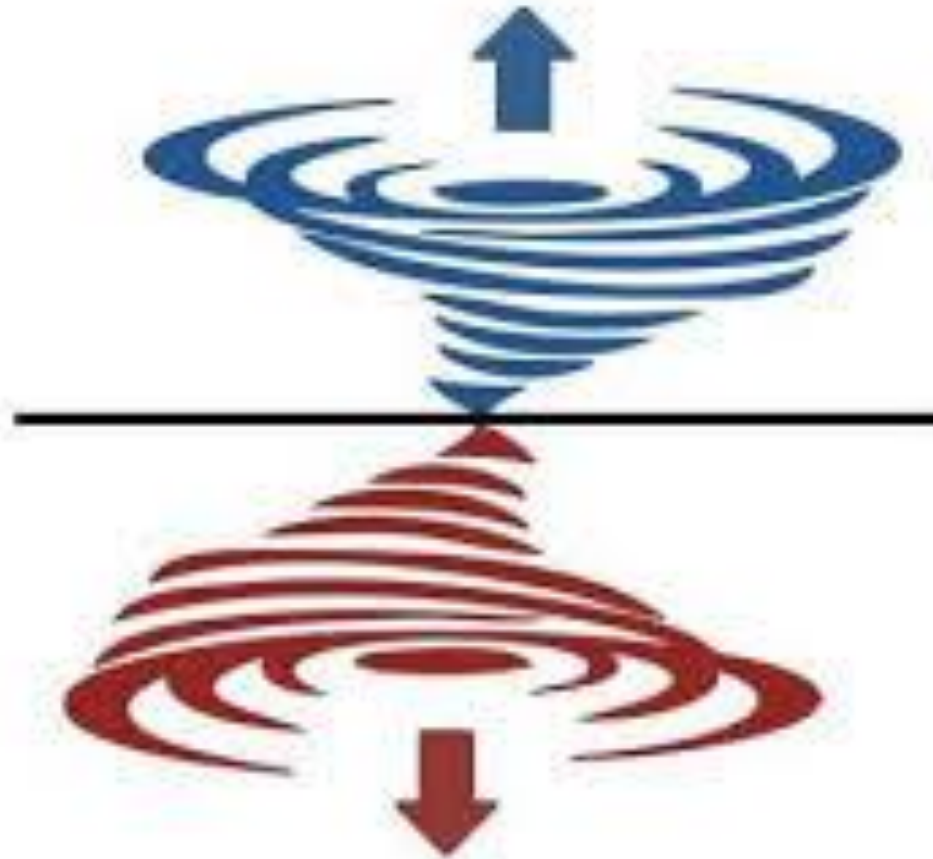
John M. Bryson

A Guide to
Strengthening
and
Sustaining
Organizational
Achievement

The Strategic Planning Cycle



In Reality, Done Correctly You Have Created
a Virtuous Cycle



DEVELOPING THE VISION
AND MISSION FOR THE
DISTRICT: HOW DOES THE
DISTRICT OBTAIN STAFF
AND COMMUNITY INPUT?



Mission, Vision, Values



Step 1: Plan to Plan

- Why is this Step Important?
- What will this Step Involve?
- What will be the Results of this Step?

Step 2:

Validate Vision, Mission, and Core Values

- Why is this Step Important?
- What will this Step Involve?
- What will be the Results of this Step?

Step 3:

Review Mandates

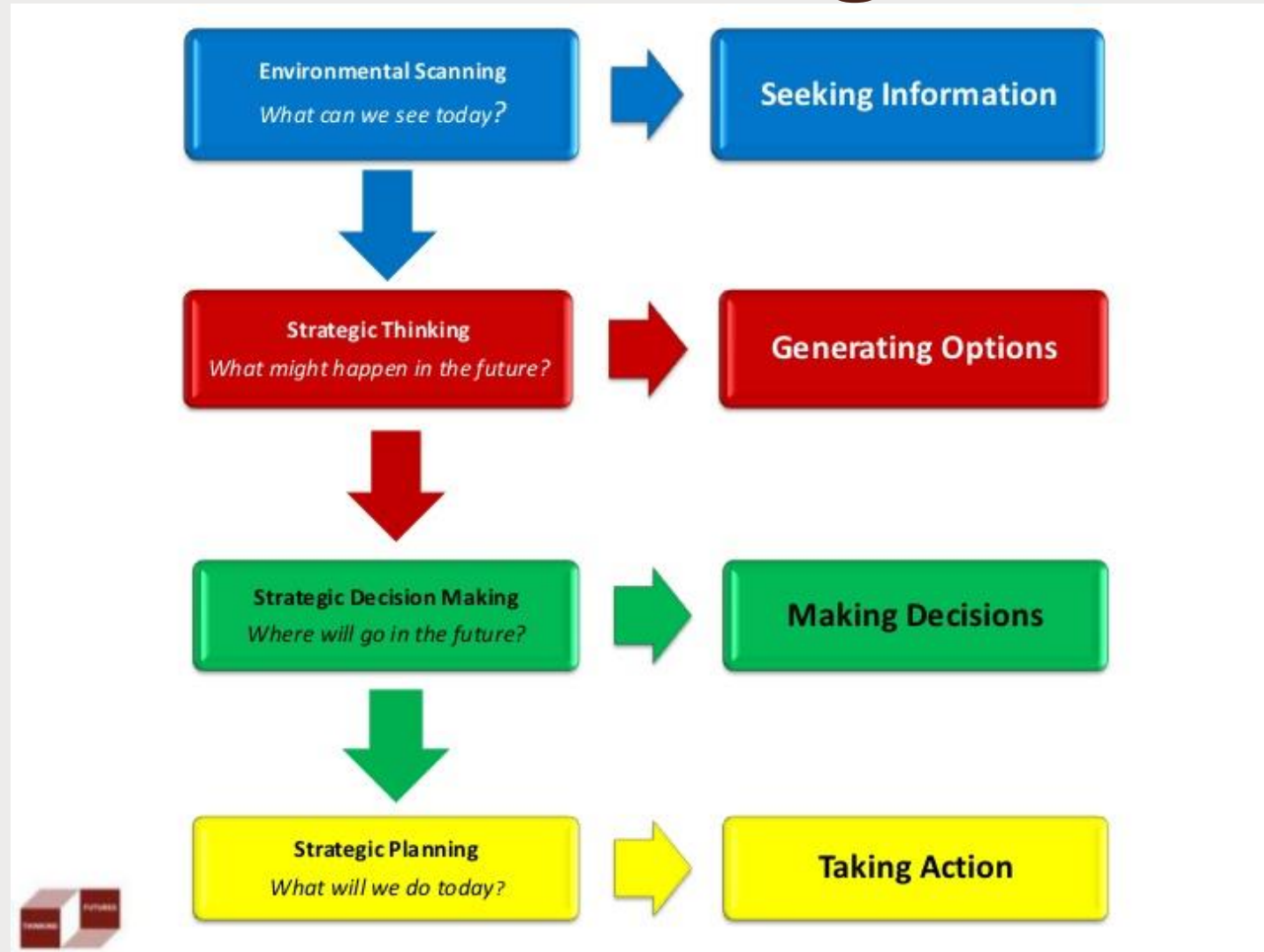
- Why is this Step Important?
- What will this Step Involve?
- What will be the Results of this Step?

Step 4

Conduct an Environmental Scan

- Why is this Step Important?
- What will this Step Involve?
- What will be the Results of this Step?

Step 4: Environmental Scanning



Step 4: Environmental Scan

Strengths, Weaknesses, Opportunities, Threats-- SWOT

	Internal	External
Positive	Strengths	Opportunities
Negative	Weaknesses	Threats

Step 5: Identify the District's Strategic Focus Areas

- Why is this Step Important?
- What will this Step Involve?
- What will be the Results of this Step?

Step 6: Identify SMART Goals to Address the Focus Areas

- Why is this Step Important?
- What will this Step Involve?
- What will be the Results of this Step?

Step 7: Stay Involved and Monitor as the Plan is Implemented

- Why is this Step Important?
- What will this Step Involve?
- What will be the Results of this Step?

Deliverables at This Point in the Process

- Validated and revised Vision
- Validated and revised Mission
- Validated and revised Core Values
- Strategic Focus Areas for your district
- Rationale for those issues
- A framework for SMART Goals to address those Focus Areas
- Goal teams to advance each goal
- Plan to monitor and adjust

Our Distinguished Panel

- David Gallegos david.rsi@hotmail.com ; Board Member, Eunice
- Dwain Haynes dhaynes@eunice.org; Superintendent, Eunice
- Kyle Rhodes krhodes@fms.k12.nm; Board President, Farmington
- Dr. Gene Schmidt gschmidt@fms.k12.nm.us ; Superintendent, Farmington
- Ellen Ben-Naim e.ben-naim@laschools.net ; Board President, Los Alamos
- Dr. Kurt Steinhaus k.steinhaus@laschools.net ; Superintendent, Los Alamos

COMMUNICATION: HOW DOES
THE BOARD COMMUNICATE
ITS EXPECTATIONS TO THE
DISTRICT?



How Have Districts made the Strategic Plan Real for the Staff and Community?

- The Farmington Experience
- The Eunice Experience
- The Los Alamos Experience

USING THE STRATEGIC PLAN
FOR YOUR BUDGET AND TO
GUIDE AND APPROVE
NEW INITIATIVES.



How have Districts Kept The Strategic Plan on the Table and Off the Shelf?

- The Los Alamos Experience
- The Eunice Experience
- The Farmington Experience

Closing Comments

- Joe Guillen, NMSBA
- David Chavez, CES

Phone attendees contact information for credit: Email your credit request to:

hugh.h.prather@gmail.com

and you will receive the training credit for the Strategic Planning Training Session

Session Evaluation

https://www.surveymonkey.com/r/NMSBA-CES_Strategic_Planning_Training

PLUS	DELTA
•What was effective about the day's session	•What could have/should have been done differently?
•What worked well for you?	•What could have been better for you?
•What did you like?	•What did you dislike?