

What is Strategic Planning, Really? An Overview

NMSBS Conference

December 8, 2018

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Overview of the Session

- ▶ Exploring what a “Strategic Plan” really is-what make it strategic
 - ▶ Examining best practices in creating a Strategic Plan
 - ▶ Identifying ways to keep the plan strategic
 - ▶ Sharing resources to build Board support in your strategic planning efforts
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What is a Strategic Plan?

- ▶ “Roadmap” for accomplishing your district’s mission and vision
 - ▶ Identifies goals of the board, based on the district’s mission and vision, core values and strategic priorities
 - ▶ Contains realistic benchmarks/measures of progress over time, tied to the priorities
 - ▶ Developed with input from all stakeholders associated with the district
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Are You Planning Strategically or Tactically?

Tactical Planning

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

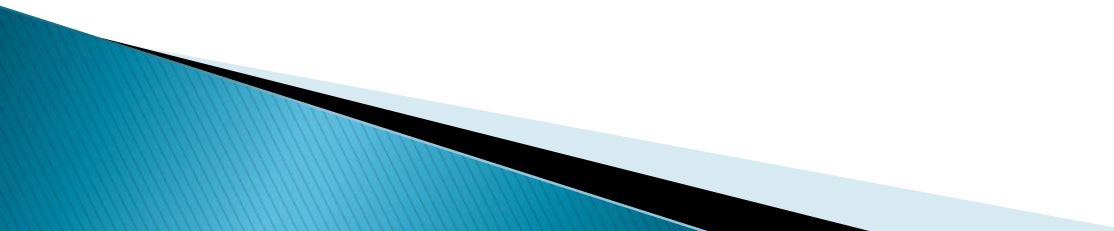
Strategic Planning

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

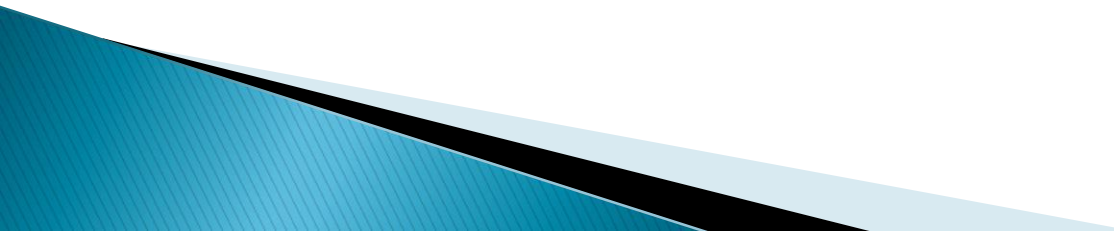
The strategic plan becomes the district's guide for all actions and decisions, at all levels, from the classroom to the boardroom.



The Strategic Plan

- ▶ Serves as the communication tool within your district and school community at large..."How are we doing?"
 - ▶ Assists in measuring progress and monitoring performance
 - ▶ Prompts change in order to achieve the district's strategic priorities
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Are These Assumptions Correct?

- ▶ You view yourselves as decision makers for the school district.
 - ▶ You believe you can influence and effect change within your district.
 - ▶ You want to see your district grow and be more successful, and the underlying assumption is, "I know we can do better if we _____. " (you fill in the blank)
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Assumptions

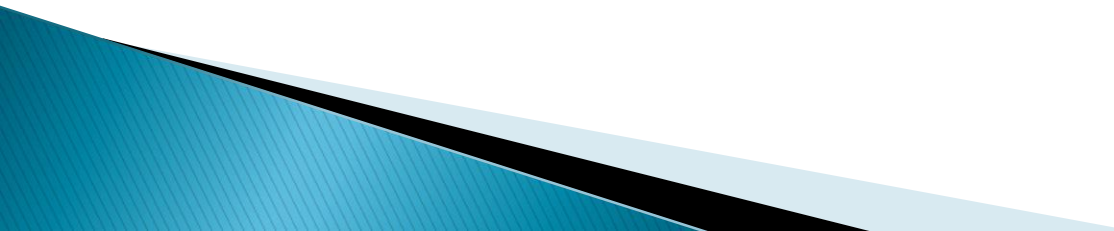
- ▶ You can see the “edges” of your strategies, but need to fill in the detail.
 - * Most school districts know the direction in which they are headed, but they need to turn generalities into specifics.
- ▶ You have a plan, but it's sitting on the shelf gathering dust; or we started this process a few years ago but never completed it; or we did this once before, spent a lot of money and we're not sure whatever happened to the plan.

Assumptions

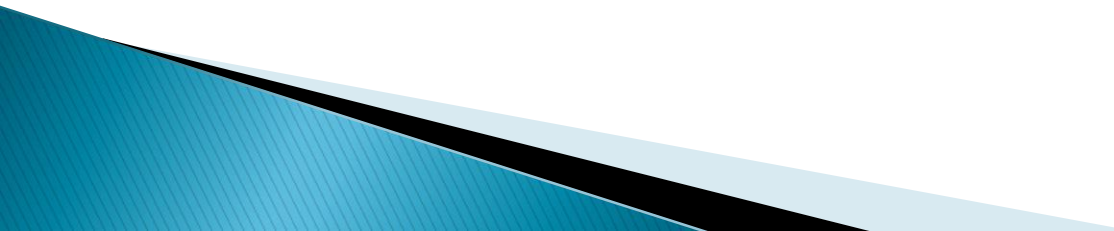
- ▶ As the leaders of your school district, you want to get everyone focused on the same page.



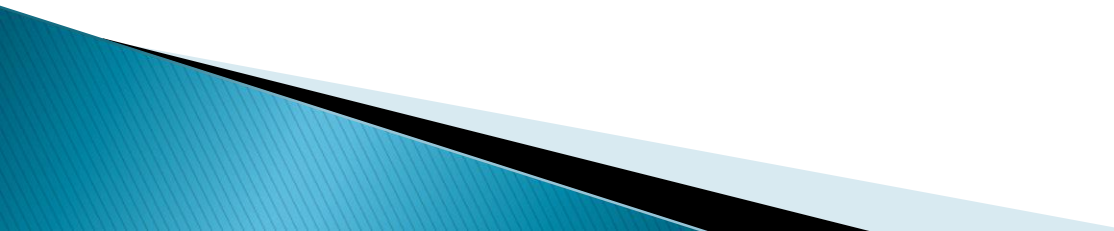
Choices

- ▶ School districts usually run in one of two ways:
 - ▶ Intentional about the path the school district will follow based on defined and common goals; or
 - ▶ Put things on “autopilot” and hope for the best path.
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Why Strategic Planning?

- ▶ Organizational management tool used to establish the district's priorities
 - ▶ Creates a common focus on the business and work of the district
 - ▶ Drives decisions for managing the district's resources
 - human and fiscal
 - ▶ Strengthens overall systems and operations
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Why Strategic Planning?


- ▶ Establishes agreements and common outcomes
 - ▶ Ensures that employees and other stakeholders are working toward common goals
 - ▶ An opportunity for engaging and partnering with the school community at large to realize district goals
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Surprising Strategic Planning Statistics


- ▶ 95% of district employees do not understand their school district's strategic plan.
- ▶ 90% of school districts fail to execute their strategic plans.
- ▶ 86% of executive leadership teams spend less than one hour per month discussing their strategic plans.
- ▶ 60% of school districts fail to link their strategic plans to their budgets.

* Adapted from the Balanced Scorecard Collaborative

What Strategic Planning is not...

- ▶ Strategic Planning is not based solely on what the board, superintendent and executive leadership feel needs to be done (assumptions)
 - ▶ Strategic Planning is not focused solely on what's not working
 - ▶ Strategic Planning is not about ignoring what the process reveals
 - ▶ Strategic Planning is not "planning for planning's sake" - a document which sits on a shelf
 - ▶ Strategic Planning is not a document of "to do lists" for schools and departments
 - ▶ Strategic Planning is not about ignoring the culture of the district and the district's readiness for change
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What Strategic Planning is not...

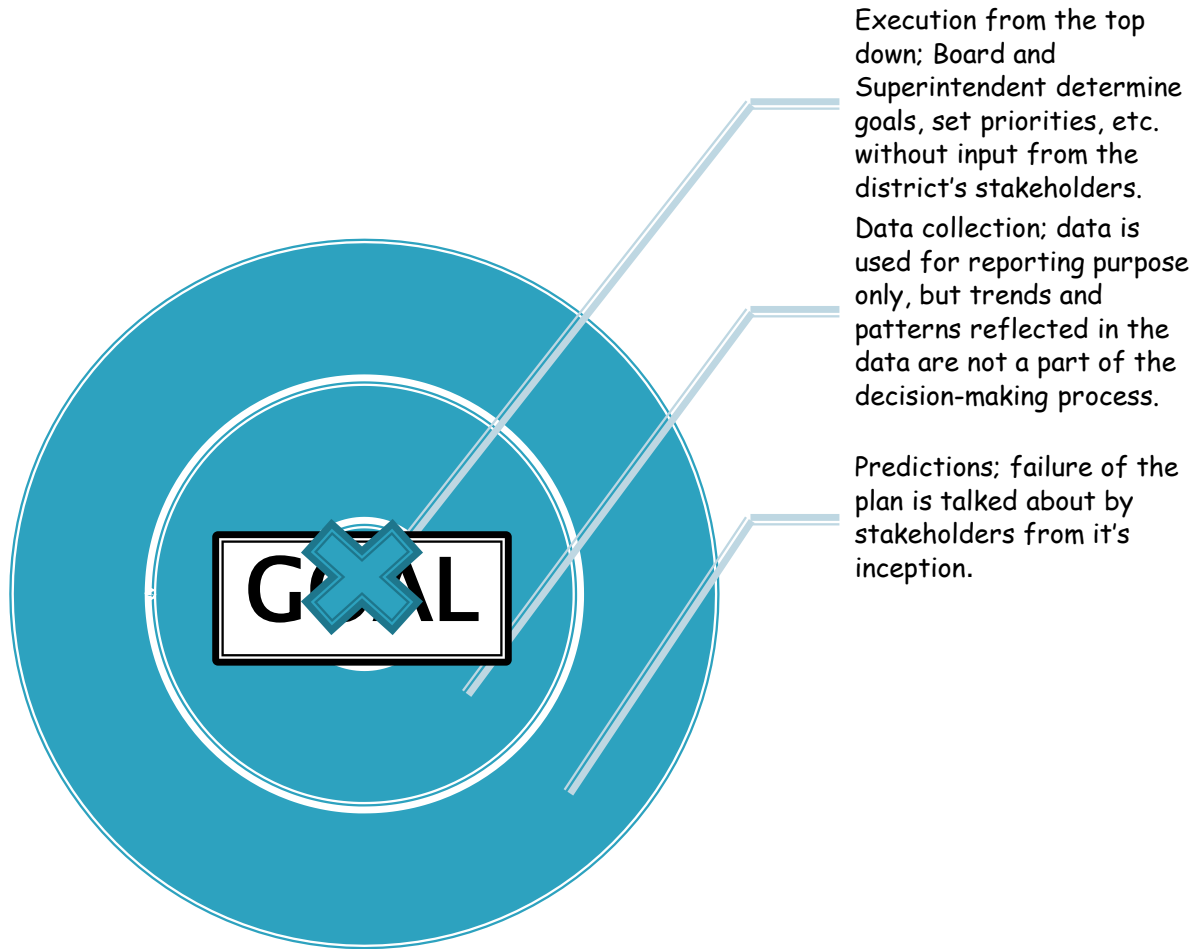
- ▶ Strategic Planning is not about creating unrealistic 3-5 year goals without benchmarks/measures of progress along the way
 - ▶ Strategic Planning is not about a plan "set in stone" and is not reviewed and adjusted periodically, based on what implementation reveals
 - ▶ Strategic Planning is not about avoiding a comprehensive data review, nor is it based on aspirations
 - ▶ Strategic Planning is not without input from district stakeholders and the school community at large
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What Strategic Planning is not...

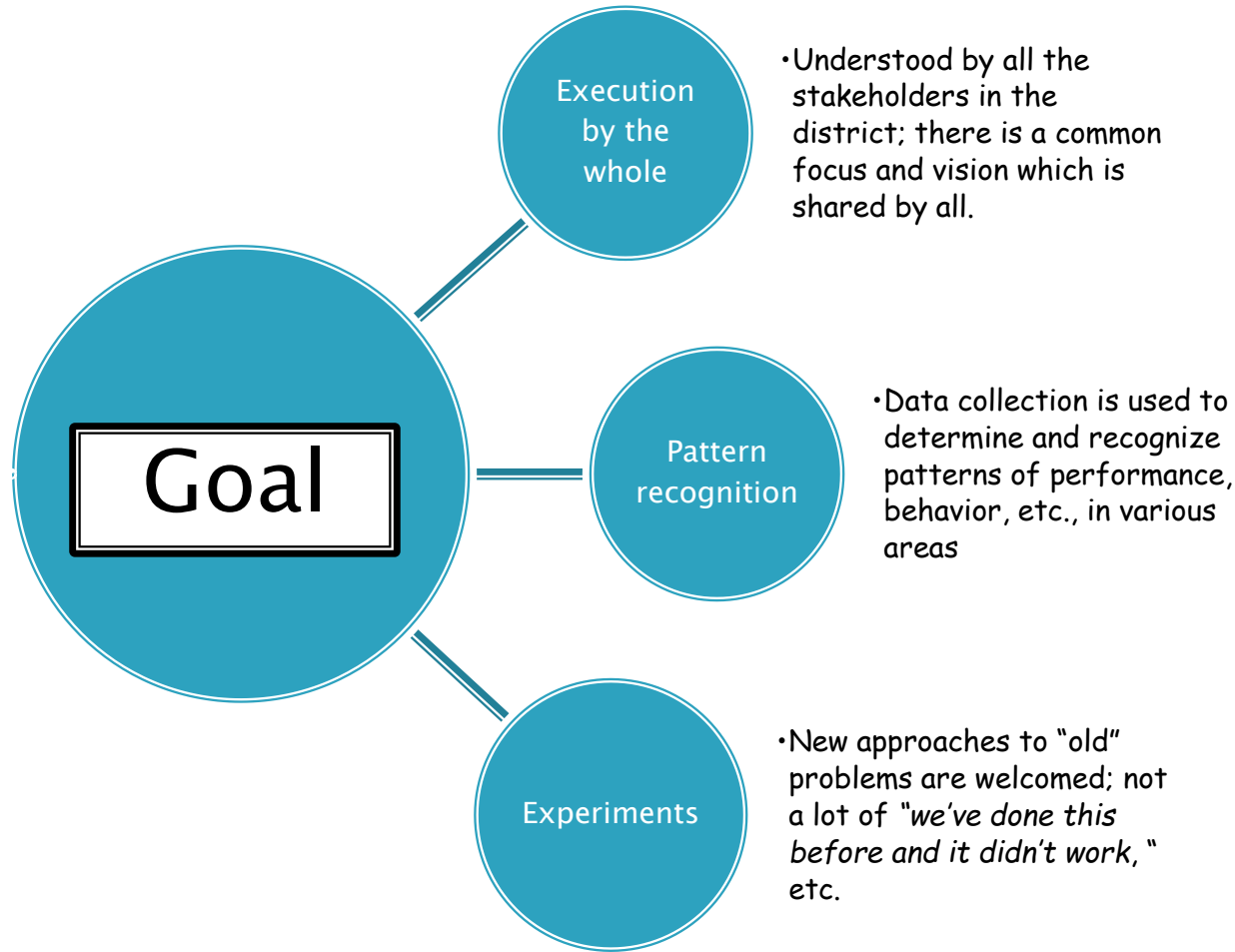
- ▶ Strategic Planning is not about mergers/consolidations, outsourcing, restructuring, or downsizing.



The Old “Classic” Model of Strategic Planning



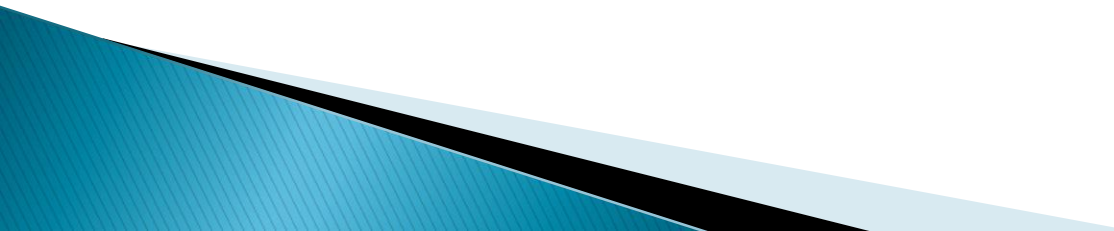
The New “Adaptive” Model for Planning



Our Adaptive Planning Process

- ▶ Work with the board, superintendent and executive leadership to review the district's mission and vision, and establish and adopt S.M.A.R.T. board goals
- ▶ Facilitate school and community input sessions to glean feedback on the board goals and identify priority areas for each
- ▶ Identify outcomes for each of the goals and the most urgent priorities for the district, with milestones/ measures of progress
 - **S.M.A.R.T. reflects Specific, Measurable, Achievable, Realistic, Timely*

Our Adaptive Planning Process

- ▶ Facilitate the development of “data dashboards” to chart intermittent and annual progress toward meeting district goals
 - ▶ Ongoing communication with the superintendent and board to keep members abreast of the strategic planning process
 - ▶ Facilitate the development of a public relations plan for rolling out the plan to all district stakeholders
 - ▶ Assistance in creating a print-ready document to share with the district and school community at large
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The Cycle for Planning

Board Goals

- Meet with Board and Superintendent to identify board goals (3-5)

Data Collection and Review of Board Goals

- District level management and mid-management
- Individual School Faculties and Parent Organizations
- Students
- Departments
- Community Organizations and Providers
- Other—determined by Superintendent and Board

Data Analysis

- Review of District Information
- Review of parent, student and community information
- Begin drafting the Strategic Plan

Initial Steps...*"First things First..."*



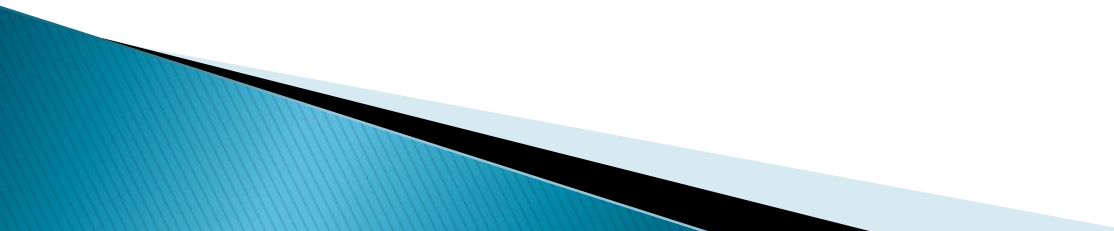
Putting the Pieces Together

The Strategic Planning Document

Board Goal One: Promote academic excellence by engaging all students, pre-K through grade 12 with a rigorous and relevant education to prepare them for college and/or careers.

Outcome 1.1: Over a three-year period, increase the graduation rate to 75% while increasing the number of students accepted to college and prepared to enter the workforce.

Overall Approach/Strategy: Our School District's motto is "*Reaching for Success.*" If we are to increase the number of students who earn a high school diploma, we must ensure that all students have access to rigorous, high quality curriculum , aligned to the Common Core State Standards. A rigorous, high quality curriculum means that teachers hold high expectations for students and that all students are challenged. We recognize that students and families must have choices in their education. Aside from the general core curriculum, opportunities for Advanced Placement, Dual Credit, classes in the arts, business ,or career education industry certification afford students and families such choices. Our expectation is that our graduates are truly "*Educated for Future Success.*"



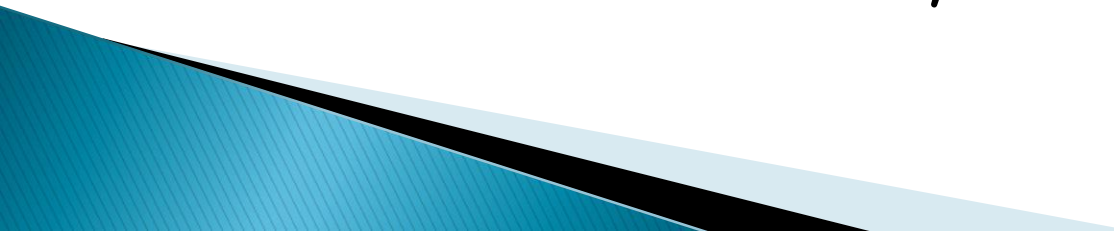
The Strategic Planning Document

Strategic Priorities	Timeframe	Responsibility	Measures/Milestones of Progress	Resources
1.1.1. Foster high expectations for college readiness through student participation in the Gaining Early Awareness for Undergraduate Programs (GEAR UP), Advancement Via Individual Determination (AVID) Program for middle school students.	SY 2015-2016 and ongoing	Director of Curriculum and Instruction Secondary Principals	Increased number of students enrolling in Advanced Placement courses in high school. Increased number of students accepted to college	State, Federal and Grant funds
1.1.2. Strengthen students' career readiness by continuing to improve articulated Career Technical Education (CTE) Programs of Study to reflect skills needed for future jobs and increasing internships and real world learning experiences for students.	SY 2015-2016 and ongoing	Director of Curriculum and Instruction CTE District Coordinator High School CTE Chair Principal	Increased number of students who earn CTE certification	Perkins Grant Determine additional funding/budget for increased number of certification programs

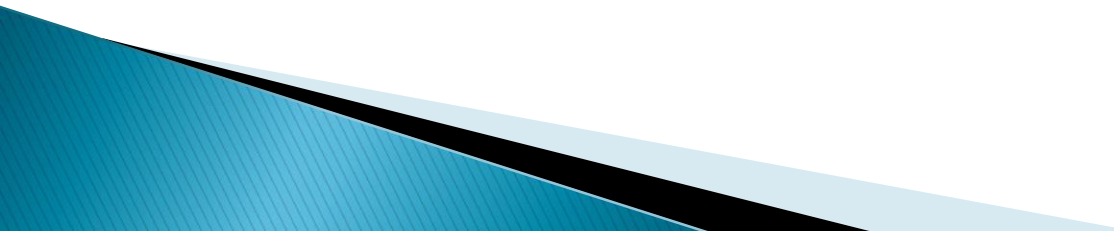
Strategic planning pays big dividends for all district stakeholders!



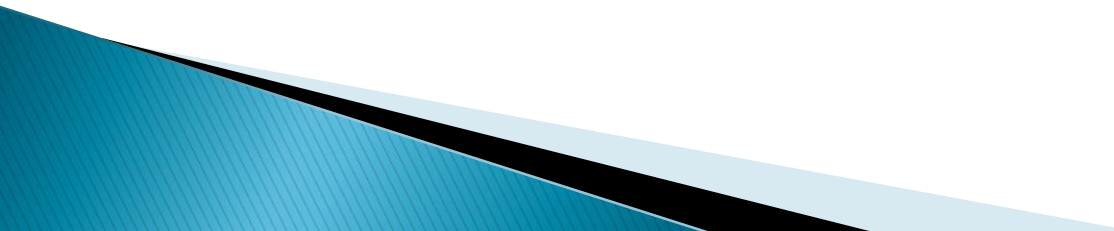
Benefits for Boards of Education

- ▶ Identifies authentic goals for the district and how success will be measured and reported on a regular basis
 - ▶ Provides a structure for accountability at all levels within the district
 - ▶ The plan creates continuity within the district and prepares it for changes that occur over time
 - ▶ Provides a transparent communication tool from the district to the community
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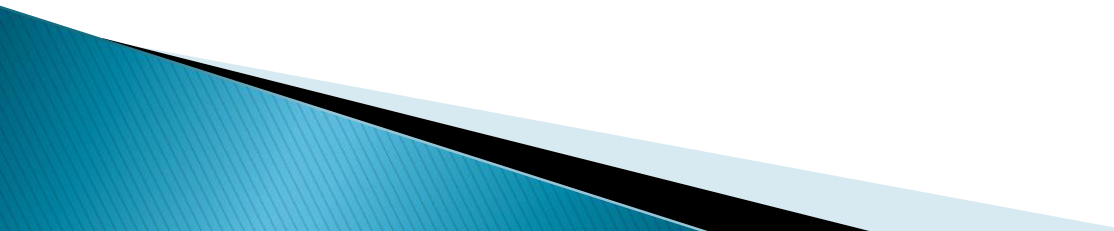
Benefits for Superintendents and Executive Leadership

- ▶ Clarifies the board of education goals and the work of the district for the superintendent
 - ▶ Provides a framework for prioritizing and managing the district's overall budget across departments and from school sites to district levels
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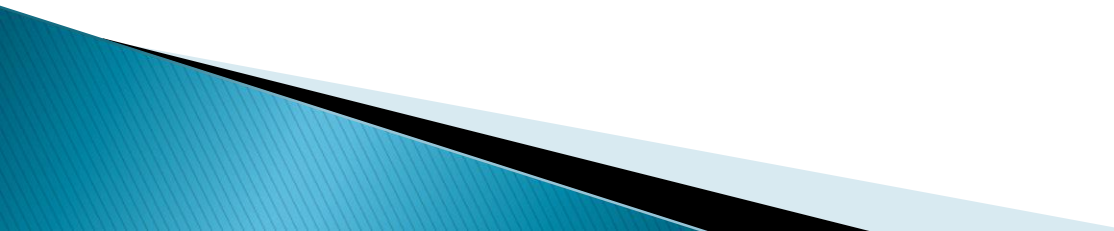
Benefits for Administrators

- ▶ Provides a structure for departments and school sites in terms of “the work” of the district
 - ▶ Clarifies and provides focus for departments and schools to contribute in realizing the overall district goals
 - ▶ Aids departments and school sites in developing budgets in targeting the strategic priorities within individual budgets
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Benefits for Teachers and Staff

- ▶ Improves communication from the district to individual school sites
 - ▶ Provides a purpose for the work and recognition of the work for teachers and staff
 - ▶ Creates a better understanding of the district's vision and mission, and the board goals that are necessary to achieve the vision of the District
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Benefits for Students

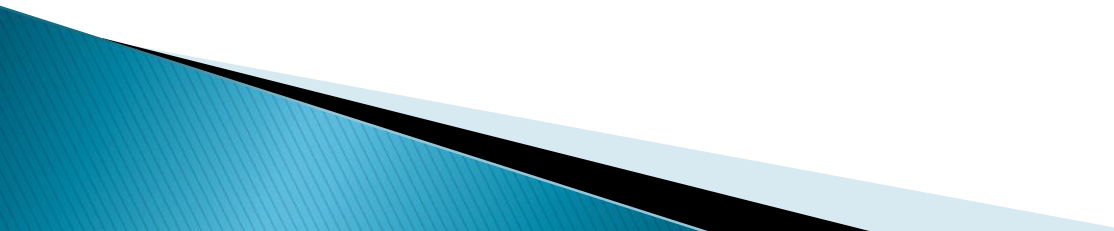
- ▶ Clear expectations - everyone is "on the same page"
 - ▶ Student focused, relevant and rigorous instruction delivered by caring instructors who are well versed in their content areas (relationships)
 - ▶ Continual opportunities to realize success and be challenged
 - ▶ Increased student achievement and success
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Odd, But Common Thinking...

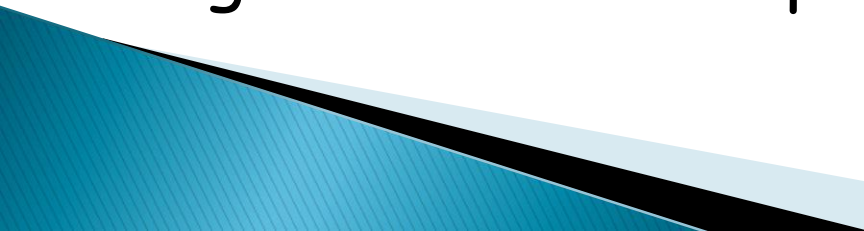
Many leaders avoid strategic planning because they consider it too complex, costly, time consuming, or difficult.



A Culture of Strategic Thinking and Planning

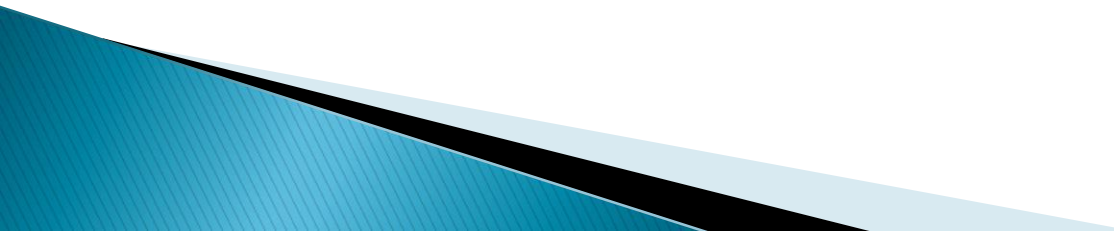
- ▶ The School Board and Superintendent **MUST** create a culture of strategic thinking in order for a school district's strategic plan to not just become something to do at the annual retreat.
 - ▶ It must become part of the daily thinking and decision-making in order to be successful, and it must be adapted from time to time to meet the district's needs!
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NMSBA Support for the Board and Superintendent

- ▶ The Superintendent can access a strategic planning training module for the Board at no cost from NMSBA
 - ▶ The module is available upon request from NMSBA and is delivered via GoToMeeting
 - ▶ Board members receive one-hour of training credit for participating
 - ▶ Helps the entire Board/Superintendent team get on the same page
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There's No Mystery to Strategic Planning!

Strategic Planning doesn't have to be mysterious, complicated or time-consuming.

- ▶ In fact, it should be quick, simple and easy to execute.
 - ▶ Strategic Planning is not just something to cross off your "to do" list, but should serve as a guide for planning the to-dos.
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Thank you!

Q & A

