



THE IMPORTANCE OF STRATEGIC PLANNING IN EDUCATION

Leadership Session for Veteran School Board Members

JULY 16, 2026

Navigating Success for Student Outcomes

COOPERATIVE EDUCATION SERVICES (CES)



Why are we here?

First, honor you as an elected official and celebrate the extensive knowledge in this room

Second, expand on your strategic planning tools and skills

Third, work to

- Drive Student Success
- Clarify Roles & Build Relationships
- Leverage Culture, Communications, Budget, and Policy for Impact

We are focused on
improving student outcomes



*“What students
know and are
able to do”*

- **Drive student success** — *learn how to actively shape your district's future* by setting clear goals and measures of success. “Student outcomes don’t change until adult behaviors change.”
- **Clarify roles and relationships** — *understand your unique role as a board member* and how to effectively collaborate with other board members, district leaders, educators, and the community to achieve shared goals.
- **Leverage culture, communications, budget, and policy for impact** — *discover how to use powerful levers* to define strategic directions for student success.





Applicable New Mexico Statutes

- **Drive student success** — NMSA 22-8-6 (Operating budgets; educational plans; submission), NMAC 6.60.9.9 (Standards of Professional Conduct), NMSA 22-1-1 (Public School Code - Legislative Findings)
- **Clarify roles and relationships** — NMSA 22-5-4 (Local school board's powers and duties), NMAC 6.20.2 (Governing Budgeting and Accounting for New Mexico Public Schools and School Districts), Governmental Conduct Act (Chapter 10, Article 16 NMSA 1978), Open Meetings Act
- **Leverage culture, communications, budget, and policy for impact** — NMSA 22-5-4 (Local school board's powers and duties), NMAC 6.60.9.9 (Standards of Professional Conduct), New Mexico Public School Finance Act (NMSA 22-8)



Introductions

- School District and number of years as a School Board member
- Does your strategic plan need a refresh or update?
- Where are you seeing growth and improvement? What are your challenges?

“School Boards are the vital voice of our community, shaping the future through collaboration and clear expectations.”

-Unknown

**THE VOICE
OF SCHOOL BOARDS**

A Strategic Plan

Does *Three Things*:

1. Communicates where we are going
2. Drives decisions about the use of resources (time, talent, and dollars)
3. Holds the superintendent accountable



Planning Process

1. Initiate and Communicate
2. Seek Community Ideas and Needs Assessment
3. SOAR (Strengths, Opportunities, Aspirations, Results)
4. Write Vision and Mission
5. Identify Core Values
6. Determine Strategic Priorities
7. Develop District Goals, Guard Rails, and Action Plans
8. Implement, monitor, and update



1. Initiate and communicate

- Set a Course for the Future
- Consider different perspectives
 - Students
 - Staff
 - Parents
 - Community and Cultural
 - Leaders
 - Elected Officials
 - Who else?



*Unlock new possibilities
for students and families*



Considerations

- Allow time for big picture thinking
- Ask the hard questions
- Embrace honesty and discomfort
- Focus energy on key decisions that will positively impact student success
- Keep it simple and focused
- Remember that every district is unique

2. Community Ideas and Needs Assessment

- Community voice is essential
- School district accountability
- Develop and strengthen partnerships for student benefit
- Build support
 - Activities and initiatives
 - Mill levies and bond issues



Community Ideas and Needs Assessment, continued

- Strategically invite participants to represent various categories
- Provide each participant with a name tag that includes a letter and a number

Students

Certified staff

Non-certified staff

Business community

General support individuals

Parents

Elected officials

Administration

Board of Education



Community Ideas and Needs Assessment, continued

- A large group is asked to identify current needs (desired change)
- Divide into like peer groups and rank identified needs
- Create stratified groups and prioritize the most highly ranked solutions
- Reassemble the large group and report the priorities identified in the session
- Explain how these priorities will be considered in the development of the district's strategic plan



3. S O A R

Strengths

Opportunities

Aspirations

Results

- Situational assessment
- A process for appreciative inquiry
- Focuses participants on contributory aspects of issues



SOAR Process

- Assemble cross-functional team representing leadership from all district departments
- Divide leadership team into smaller groups
- Brainstorm the district's strengths, opportunities and aspirations
- Use positive questions to generate images of possibility and potential for the district
- Small groups reconvene to report out to larger group
- Summarize the organization's positive core – the total of unique strengths, resources, capabilities and assets
- Individuals each rank their five highest priority strategies
- Determine district's top priorities



4. Vision - a compelling picture of the desired future

- What our school district strives to look like (state of being)
 - *Clear*
 - *Inspirational*
 - *Memorable*
- What we aspire to do every single day?



Vision Examples

1. Every student achieves their highest potential and contributes positively to our community and beyond
2. A community of lifelong learners and leaders who positively impact our community and the world
3. Inspire a passion for learning, innovation, and collaboration in every student
4. Equip students with the knowledge, skills, and character to thrive in a changing world

- Empowering learners, transforming lives
- Every student, future-ready
- Inspiring excellence, cultivating potential

4. Mission Statement

How are we going to achieve the vision?

Core purpose of the school district and its contribution to society

Descriptive

Empowering

Understandable





5. Core Values

- What we believe and hold true
- Guides the behaviors and actions throughout the organization
- Special and unique to our school district and shared by all
- How we will endure and last no matter the challenges

Examples



- Be accountable for every child
- Honor and celebrate diversity
- Address the root causes
- Stay meaningfully engaged
- Ensure students have a voice in the process
- Filter all decisions through the lens of equity and the whole person



Why Core Values?

Core Values guide behavior to support students, staff, and collaborative work

- Think of the worst team you have ever been a part of where members are dependent on each other

What made this experience bad?

- Think of your best team experience

What made this experience good?

- What behaviors make for a high-performing team?

6. Determine District Strategic Priorities

- Utilize information from the Community Needs Assessment and the SOAR process to identify strategic priorities
- Develop goals and specific action plans to achieve the district priorities





Use cross-functional teams

All departments contribute to shaping the direction, data, and metrics

Tenets of the Process

- Align leadership and staff with direction of district
- Engage employees across all schools and levels
- Continually communicate your goals
- All staff take action to review data and achieve goals

7. Setting Goals

- Clarify your ideas
- Focus your efforts
- Use your time and resources productively
- Increase your chances of achieving what you want for your students



SMART GOALS:

S

Specific

M

Measurable

A

Achievable

R

Relevant

T

Time-based

Explained

- **Specific**
Simple, sensible, significant
- **Measurable**
Meaningful, motivating
- **Achievable**
Agreed, attainable
- **Relevant**
Reasonable, realistic, and resourced, results-based
- **Time-based**
Time-limited, time/cost limited, timely, time-sensitive

“The trouble with not having a goal is that you spend your life running up and down the field and never score.”

-Bill Copeland



Student Outcomes-focused Goals



Short-term goals

- *Helps you stay focused and make progress toward the larger goals*
- *Objectives with actionable steps*
- *Report quarterly*

Long-term goals

- *Forecast 3-5 years*
- *Anticipate and mitigate potential challenges*
- *Review and update annually*

7. Establish Guardrails

Guardrails are non-negotiable statements set by the board that clarify what success looks like for students and what actions are unacceptable.

The board's primary role is to set clear expectations for *student outcomes*, and then to set *guardrails* for the superintendent to operate within. This frees the superintendent to focus on the "how," while the board focuses on the "what" and the "what not to do."

Source: "Greater on Their Behalf: Why School Boards Fail, How Yours Can Become Effective" by Airick Journey Crabill



Examples

- *"At no time will a school campus be without a clearly defined and practiced emergency response plan."*
- *"While working to improve reading and math achievement, do not cut funding for music and the arts."*
- *"The district will not implement strategies that disproportionately disadvantage any subgroup of students."*



7. Writing the Strategic Plan

- Action plan for each strategic priority
- Strategies to accomplish each strategic priority
- Measures of success (Evaluation)
- Completion date
- Lead person
- Responsible parties
- Use a monitoring/reporting mechanism



Important Considerations

- What do we need to accomplish?
- How will we measure our progress and determine whether we achieved our goals - Key Performance Indicators (KPIs)?
- How will we track and report progress?



AI is poised to significantly impact strategic planning in PreK-12 schools by transforming how data is analyzed, decisions are made, and resources are allocated.

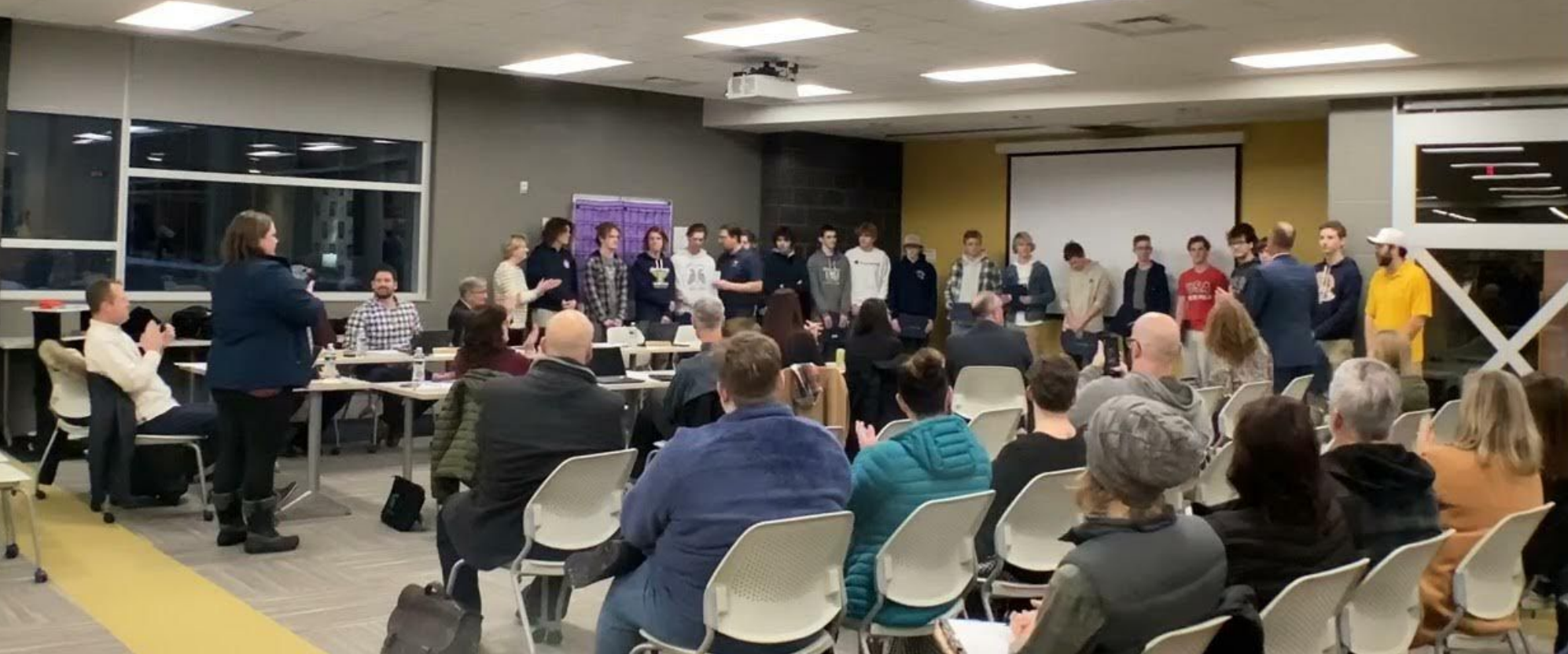
Artificial Intelligence (AI) in Strategic Planning

- **Equity and Access:** Ensure that AI tools are accessible to all students.
- **Academic Honesty:** Establish clear guidelines on the acceptable use of AI tools.
- **Bias and Fairness:** Address the potential for bias in AI algorithms and ensure that AI tools are used fairly and equitably for all students.
- **Transparency and Explainability:** Promote transparency in the use of AI tools.
- **Clearly communicate to students, parents, and educators:** Identify how AI is being used and how it impacts their learning experiences.

School Board Work Session

- Team building activities with board members and superintendent
- Clarify group norms to guide how the group will work together cohesively
- Review/revise the district vision and mission
- Review results of Community Needs Assessment





School Board Work Session

- Review Current Conditions
- Leadership team joins
- Data analysis and review

- Listen first
- Seek student voice
- Collective commitments

Strategic Plan Adoption



- School Board reviews and approves revised draft of strategic plan
- Ongoing monitoring and quarterly reporting of progress
- Community follow-up to present strategic plan

8. Implement, Monitor, and Update

- Use your vision, mission statement, and established priorities to say “no” to initiatives that won’t enhance your long-term strategic position
- Maintain a long-range perspective and make decisions that stay the course for success for years
- Regular progress monitoring & reporting to the school board, community, and staff
- Superintendent evaluation based on progress in achieving the priorities outlined in the Strategic Plan



Our Ultimate Compass: Student Growth

“Student growth starts with data-informed governance and caring support.”

- This is our shared “why” — ensuring every student thrives, a core responsibility in the New Mexico Public School Code
- How do we achieve it — through a high-functioning, unified Board-Superintendent team.

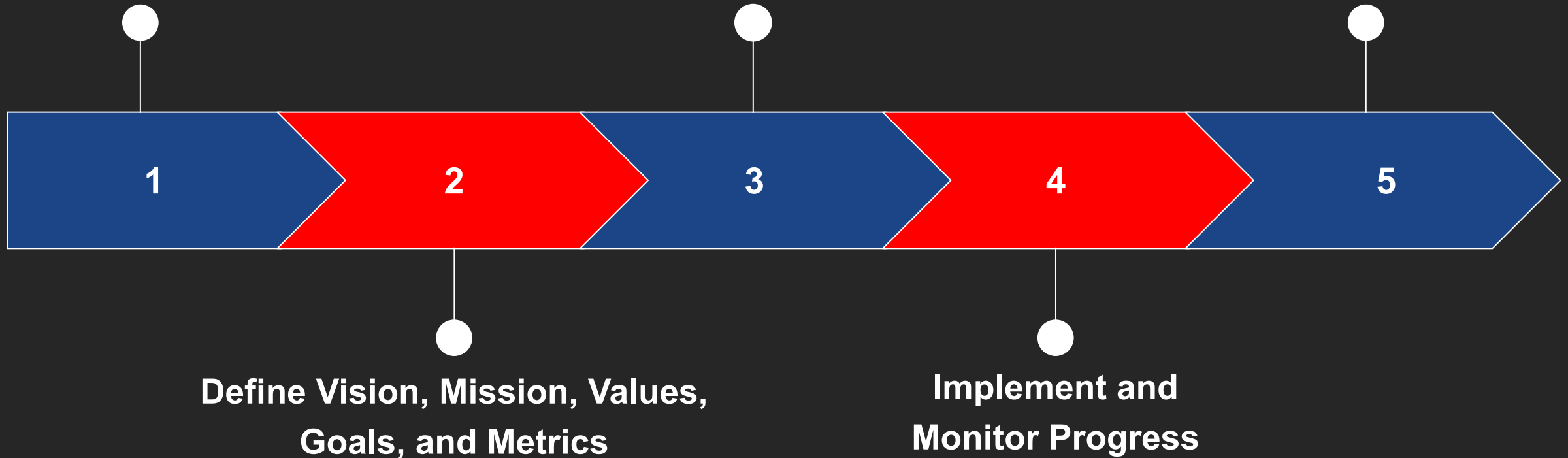


Summary - Strategic Planning

**Initiate and Seek
Community Input**

**Develop Strategies
and Actions**

**Review Data,
KPIs, and Update**



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COOPERATIVE EDUCATIONAL SERVICES



Simplify procurement.
Maximize results.

Thank You!