

Strategic Planning Process

GCCAA 02/24/11

Where you are going? How are you going to get there? When will you arrive?

Strategic Planning is the process of looking at all aspects of your school and planning how you wish to move the school forward. It provides the 'big picture' of where you are, where you are going and how you are going to get there.

Strategic Planning looks at three main questions:

- Where is the school now?
- Where does the school want to be in 3, 5, 10, 20 years?
- How are we going to get there?

All schools should have a strategic plan. Without one, the school's key stakeholders (parents, students, staff and the community) don't know where you are going. With a strategic plan, everyone is working towards the same vision, trying to reach the same goals, and building commitment to the organization.

- CLARIFY THE VISION
- COLLECT THE DATA
- IDENTIFY THE CRITICAL ISSUES
- CHOOSE THE STRATEGIES
- WRITE THE PLAN

You are welcome to copy our FREE articles...all we ask in return is that you include our names (Robyn Collins and Wendy Nichols) and a link to this site: www.strategicplanning4schools.com

The Best Five Tips for Successful Strategic Planning

Tip 1: Be clear about your vision.

If you don't know what you want to achieve, you can't make decisions about how you're going to get there. One of the key attributes of successful schools is that they have a well-articulated vision that all members of the school community are aware of and believe in. It is worthwhile spending time to get your vision 'right' because all later strategic planning decisions depend on whether or not the actions arising from the plan are consistent with the vision.

Tip 2: Be strategic.

This tip is so obvious that it is almost ridiculous; however, a great deal of strategic planning gets bogged down in detail rather than looking at the bigger picture. There are many operations in the day-to-day running of a school that remain relatively constant; for example, attention to student safety, the curriculum, the co-curricular program. Unless you intend to change one of these operational areas, they should not be part of your strategic planning process. Rather, your strategic planning should deal with key strategic questions and issues. That is, the issues on which school effectiveness, student outcomes and the school's viability depends.

Tip 3: Be collaborative.

A plan won't work if people aren't out there making it happen. People won't work with any enthusiasm on a plan they don't 'own'. The more members of the school community involved in the development of the plan, the more 'buy-in' you'll have and the more people who will be motivated to make the plan work. At the very least, school staff, students and parents should be involved in some stage of the development of your strategic plan. You might also consider involving local business people, the local community, old scholars and any other relevant people.

Tip 4: Be specific.

Key strategic goals need to be SMART. That is they should be specific, measurable, achievable, realistic and time-limited. Specific means they should be clear and able to be understood by all, including those not involved in the process. Measurable means they should articulate the desired outcome, not the specific strategies. For example, not 'improve student outcomes' but 'raise benchmarks testing results by 10% by the end of the year'. Achievable means that the goal should be rigorous and cause stretching but it also should be possible to reach. People will soon lose interest in a goal they can never attain. Realistic, is similar to achievable. There is no point in setting a goal that 'all students will receive 100% in the end of year exam' when clearly the only way this might be achieved is by setting a test so simple that anyone could do it – but it would hardly encourage good teaching or learning! Time-limited means that the goal has an end, and that the end is not so far into the future as to be meaningless. All goals need to yield some results by the end of the strategic planning period, and preferably there should also be some short-term goals leading towards the bigger goal as well.

Tip 5: Be flexible.

No strategic plan should be 'set in stone'. On the contrary, plans should be regularly revisited, revised and reviewed in order to accommodate changes in the internal and external environment and to respond quickly to education policy changes and external environment trends.

The 7 Deadly Sins of Strategic Planning

1. Gluttony or thou shall not be all things to all people. (consuming more than one requires)

One of the worst things a school can do is try to cover every area of school operation in their strategic plan. Many strategic planning processes begin like this... 'let's look at all areas of the school – governance, staffing, student welfare, curriculum, buildings, environment, finances, marketing, master planning, pastoral care, etc. Pretty soon you have so many goals and strategies that nothing will get done.

2. Thou shall not set goals without examining data.

The first step of strategic planning should be to determine where your school is right now. This step comes before any other step in the strategic planning process. Collecting data allows you to identify where the areas of strength and weakness are in the organization, and where the gaps are. It also provides the information you need to see what the critical issues might be. For example, there is no point in deciding that one of your strategic goals for the year is to improve student behavior if you don't know what specific behavior you want to improve or whether, in fact, this is an area of concern. Collecting data on student attendance, bullying, referrals for bad behavior, detentions, suspensions, exclusions etc. should all precede focusing on behavior as a key issue. You might even find that student behavior is not an issue for your school!

3. Envy or thou shall not get on the bandwagon. (the desire for others' traits, characteristics, abilities, possessions)

Schools need to be very clear that undertaking a project occurs for the right reasons, not because a particular innovation is flavor of the month. It is all too easy to get distracted from the school's vision and mission by following what the school down the road is doing, rather than doing what is right for your school. This is not to say that schools should not be keeping an eye on the 'opposition'. However, all decisions and strategic plans should focus on what is the best for our students in our school, not what seems to be a good idea at the time. This is why Sin 4 is so important.

4. Pride or thou shall not ignore research. (An excessive belief in our own abilities)

The volume of education research is immense, and much of this research gives clear guidelines about whether a particular action is worth taking. For example, there is a great deal of research about the benefits of reducing class sizes, much of which points to the fact that, except in Years P-3, schools should not waste their money on reducing class sizes by a few students. Schools should carefully read this research, and other research that provides information about the benefits, or otherwise, of any innovation they are intending to introduce.

5. Thou shall not ignore your plan.

A strategic plan is a living document. It is not something you should complete for school accreditation, or because some authority says you must have a plan, or because you think it is something businesses 'do'. A strategic plan is the key document, the map, for moving your school towards your vision. If you put your plan away and leave it in the cupboard until it is time to develop a new plan, your school community will be cynical, disillusioned and unlikely to be enthusiastic about consulting on the new plan.

6. Sloth or thou shall not forget to act (the avoidance of physical or spiritual work)

Plans work when someone does something. As important as having a plan is deciding who is going to make it happen. When the plan is written the next key question is 'Is anybody doing anything?' This is why it is essential in writing the final plan, that someone is made responsible for implementing each part of the plan. This allows the school management/board to check with a particular person or team and ensures that a particular person/group is accountable for implementing the plan.

7. Thou shall not forget to review.

A strategic plan is the essential 'road map' for moving your school towards its desired vision, but it is a road map that changes as you hit obstacles and bumps in the road. Schools need to regularly review their plans for relevance and currency. An annual 'light' review is recommended and a formal review every 3-5 years is generally the practice in businesses and schools.

The other deadly sins are, of course, lust, anger and greed but we could not, for the life of us, see how these might fit into strategic planning!

Five ways to encourage strategic thinkers

Tip 1: Be explicit about your strategy. Many personnel in schools, and certainly school principals, complain there is not enough time to think. Make clear to staff that you value and encourage thinking as much as you value completion of day-to-day tasks. Encourage staff to read and present new ideas as a regular session in staff meetings. Present ideas yourself and lead staff discussions. Provide an ideas box for students and staff. Gather information all year round so you constantly have relevant and timely data to inform decision making.

Tip 2: Provide time. Often school staff meetings begin with information sessions with time for thinking and professional development tacked on the end if there is time. Much of the information could be supplied on paper, via email or in one on one conversation to the relevant people. If information can be delivered by alternative means, it should not be included in the staff meeting. Turn staff meetings on their head! Start with professional development, reports from staff who have discovered an interesting piece of educational research or with a group reading of an article relevant to professional learning. If there is time left over, then provide information, although not if can be provided some other way.

Tip 3: Reward your creative thinkers. Look for ways to reward your creative and strategic thinkers. Provide opportunities for them to lead an important change. Provide time for them to attend meaningful professional development that focuses on ideas. Provide release time from class to follow up on a piece of important research.

Tip 4: Review board priorities. How much of your school Board's time is focused on strategic matters, including monitoring the progress of strategic projects? How much time is spent in hearing verbal reports on matters already supplied in written reports? How much time is spent on operational matters which are not the business of boards? Look at your board agenda and change it to a strategic thinking focus. Allow questions about reports but do not allow the complete presentation of a report that board members should have already read. Listen to board concerns about school operations but continually remind board members that operations are the responsibility of the principal, not the board. Make central to each board meeting, one of the strategic priorities of the school. Provide a report on progress and reassure the board that strategic targets are on track while also discussing as a group the issues that might face the school in future.

Tip 5: Communicate. How much of what happens in your school is communication, and how much information giving? Review the information that leaves the school and the meetings and conversations that take place. How much is providing information that could be conveyed in some other way? How much goes to all people, when only a small number really need the information? Almost every review done in every school finds that one of the major problems perceived by stakeholders is no one communicates! And this is largely true. Schools generally supply an inordinate amount of information, but do not provide meaningful communication. And where there is little meaningful communication schools miss the opportunity to collect all of the ideas and strategic thinking that is out there. Encourage strategic thinking by constantly providing forums for the exchange of ideas and opportunities for meaningful dialogue which sparks creative solutions to issues facing your school.

Why consult with stakeholders?

There are many individuals and groups associated with schools and many of these people are likely to have valuable ideas to contribute to schools. Because they are close to your school they also have a vested interest in its success. The more you involve these people in contributing to the direction you wish the school to take, the more ownership they will have of the final 'product' and the more loyalty for the 'brand'.

Generally when schools talk about their stakeholders they are thinking of the board, parents, staff and students; however, this excludes many important and valuable groups from providing input to your strategic planning and thinking.

Stakeholders also might include:

- Old Scholars
- Business owners
- Employees who take students for work experience, for example
- Clients/customers
- Community groups
- Community leaders
- Competitors
- Donors
- Experts on educational issues, such as university personnel
- Regulators
- Suppliers
- Professional Organizations
- Partners or potential partners
- Potential enrolments.

Consulting with a wide variety of stakeholders has much to offer your school. Widespread consultation:

1. Increases the quality and quantity of input and reduces the chances of 'group think'. It is possible that those closest to the school are also those most resistant to change. A broader perspective challenges traditional thinking and increases the likelihood of more creative decision-making and problem solving.
2. Encourages ownership of school goals. The more opportunity people have to shape the direction of the school, they more likely they are to be satisfied with the final product. All of the conventional wisdom, as well as educational research, tells us that ownership of decisions and strategies is essential for take up of a plan.
3. Increases the chances of success. The more commitment you have to a plan the more the people involved are motivated to make it happen and the more interest others have in monitoring its success.
4. Widespread consultation improves relationships. Genuinely seeking and valuing the input of others increases self-esteem and improves relationships. It also reduces the chances of misinformation and complaints of lack of transparency.

Schools can consult in a variety of ways: by surveying as many stakeholders as possible; by providing opportunities for one on one meetings; by organizing focus group consultations with a small group of stakeholders.

Surveys are cost-efficient and provide quantitative information. One-on-one meetings build personal relationships and provide deep, quality and detailed data. Similarly, focus group consultations bring together people, often from the same representative group (e.g. parents) to present the point of view of a particular category of stakeholders and provide qualitative data.

All of the data provided from a wide cross section of stakeholders feeds into the school's strategic planning and thinking, and increases the chances of accessing quality data for quality decision making.

How do you move from a Strategic Plan to a Continuous School Improvement Plan?
(discussion question for the GCCAA group)