A PRACTICAL APPROACH TO STRATEGIC PLANNING
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November 16, 2012 2:45-4:00

“ONLY THE PARANOID SURVIVE.”
Andy Grove, Intel

Session Agenda

- The benefits of an effective planning process
- A practical approach
  - Bottom-up, collaborative & inclusive
  - Cost-effective
  - Deliverable within 2-4 months
Strategic Plan Benefits

- Agreement on district priorities & direction
  - Continuity of purpose: board, staff, families, & community stakeholders
  - Establishing clear priorities
  - Enabling consensus

Strategic Plan Benefits

- Plan ownership, commitment & acceptance
  - Encouraging input
  - Incorporating diverse ideas & opinions
  - Creating a “district plan” rather than a “board plan”

Strategic Plan Benefits

- Communication with key stakeholders
  - Strengthening support
  - Parent & community engagement
  - Positive public relations + renewed interest
A Practical Approach

- Extensive use of stakeholder focus groups
- Identification of key strategic elements
- Use of elements: validate vision/mission statements
- Goal development
- Formulation of strategies and action plans
- Continuing assessment: a living plan

Process Review & Agreement

- Board & district leadership agreement on Plan
  - Plan expectations
  - Focus group identification & engagement
  - Focus session agenda & format

Focus Group Dynamics

- Identify key stakeholder constituencies
- Determine group size & number of sessions
- Define time-frames
Focus Group Agenda

- District purpose: “We are preparing our students for __________.”
- SWOT analysis
- Purpose elements
- Goal definition
- Related strategies
- Key take-aways

Focus Group Format

- A reasonable size: 12-15 participants
- Effective scheduling
- Effective outreach
- Board member participation
- Superintendent involvement

Response Tracking

- Use of an Excel Matrix
  - Group identification (columns)
  - Defined responses (rows)
  - Ranked by frequency
  - Development of appropriate sub-groups
Response Summary/Commentary

- Board/Superintendent report & commentary
  - Summary of focus group session activity
  - Category review
  - Response frequency rankings within categories
  - Other notable responses
  - Sub-group commentary

Definition of Plan Elements

- Define key elements from focus group data
  - Board/Superintendent review/retreat meeting
  - Identify key elements: composite and by sub-group
  - Validate & prioritize

Mission, Vision & Goals

- Develop/validate vision, mission & goals
  - Utilize focus group data appropriately
  - Distill to direct, concise statements: one page
  - Common voice & logical flow
  - Goals vs evidence-based foundational principles
Plan Adoption

- An Iterative & Inclusive Process
  - Initial plan draft
  - Board review, comment, and edits
  - Iterative changes
  - Board approval
  - Tasking of strategies & action planning to district leadership

Strategies & Action Plans

- Committee formation around goal & principle statements
  - Three-year strategies
  - One-year detailed action plan: timeframes & deliverables
  - Year 2 and 3 action plan elements: future development

Comprehensive Plan Adoption

- Board review & approval of final plan
  - Incorporating mission, vision, & goals
  - Supported by strategies & action plans
  - With a defined roll-out process through PR support, press releases, etc.
Assessment/Evaluation

- Ongoing board review of goal/principle progress
- Incorporation of a graduate survey
  - Focus on purpose
  - Annual report back to board re: survey results
  - Possible Plan adjustments based on feedback

Summary

- A Practical Approach
  - Extensive engagement of stakeholders
  - Achievable within reasonable timeframes
  - At reasonable cost
  - With tangible, ongoing benefits

Thank you for attending!

Please give us your feedback by submitting an evaluation for this session.