

The background features a white wall with a grid of circular holes. Each hole is filled with a different color, creating a vibrant, multi-colored pattern. The colors include red, yellow, blue, green, and orange. The floor is made of light-colored wood planks.

NMSBA NEW BOARD MEMBER TRAINING

STRATEGIC PLANNING

THURSDAY, JULY 14, 2022

AGENDA

- I. Why is Strategic Planning Important
- II. What is Strategic Planning
- III. Benefits of Strategic Planning
- IV. Value of Strategic Planning
- V. Strategic Planning Process Steps
- VI. Prioritize Action Plans
- VII. Develop a Plan
- VIII. Execute and Manage the Plan
- IX. Review and Revise the Plan
- X. Plan the Work – Work the Plan
- XI. Master the Strategic Planning Process

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Why is Strategic Planning Important?

- “If you don’t know where you’re going any road will get you there” Lewis Carroll
- Setting the district’s strategy for success is important.
- To set the course for a successful strategy takes time, dedication, and a clear vision for the district.
- All shareholders must be willing to stay the course once the strategy is clearly defined and put into operation.

Let’s look at what strategic planning is and how it can benefit your organization



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What is Strategic Planning (SP)?


- **SP is the ongoing process of using available knowledge to document a district's intended direction.**
 - **The process allows you to prioritize:**
 - **Efforts,**
 - **Effectively allocate resources,**
 - **Align shareholders and employees on the organization's goals**
 - **Ensure goals are supported by data and sound reasoning**
 - **SP is an ongoing process not a one-time meeting**
 - **A SP when properly developed and executed allows the organization to:**
 - **Respond to situations successfully**
 - **Allows the organization to adjust course and correct direction**

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Benefits of Strategic Planning

- It creates one, forward-focused vision
- Draw Attention to Biases and Flaws in Reasoning
- Track progress based on strategic goals

Strategic planning value

- Align the school board and management
 - Align the management team on a strategic agenda to move the organization forward
 - Communicate clarity of direction throughout the organization
 - Provide clear direction and thereby restore integrity of leadership
 - Solve key performance problems
 - Develop a path forward that will attract outside funding
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Strategic planning value

- Improve execution on a change agenda
- Create agreement on core beliefs and principles
- Develop a tool to manage and create the organization's future

When strategic planning is positioned as a learning process, formal strategic planning can help leadership make solidly grounded strategic decisions that will benefit the school district and the children it serves.

Strategic Planning Process Steps:

- SP is the method that organizations use to develop plans to achieve overall, long-term goals
- The strategic planning process is broad
 - It helps create a roadmap for which objectives you should put effort into achieving;
 - And which initiatives would be less helpful to the district.


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Let's review some important steps that will set your district up for success.

Determine your strategic position

- Involve the right stakeholders from the start
 - Consider both internal and external sources
 - Identify key strategic issues through research, collecting information and data
 - Pulling in customer insights
- Review (refresh, create) mission, vision statements and core values
- Use other district, state and national data current and future demands to identify issues to be addressed
- Conduct a Strength, Opportunities, Aspirations and Results analysis of your district

As you synthesize this information, your unique strategic position in the market will become clear, and you can start solidifying a few key strategic goals.



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Once you've identified your current position relative to other districts, it is time to determine objectives that will help you achieve your goals. Your objectives (action plans) should align with your district's vision and mission.

Prioritize your Action Plans:

Prioritize your objectives by asking important questions such as:

- Which initiatives will have the greatest impact on achieving our district's mission/vision and improving our position in the state, region, nation?
- What types of impact are most important (e.g., student achievement, culture/climate)?
- Which initiatives are most urgent? (Action Plans)

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- What will we need to do to accomplish our goals? (Strategies)
- How will we measure our progress and determine whether we achieved our goals (key performance indicators)?
- How will we report/track progress


Objectives should be distinct and measurable to help you reach your long-term strategic goals and initiatives. Potential objectives can be updating academics, recruiting qualified/certified staff, and facilities to name a few.

Develop a plan - Now it's time to create a strategic plan to reach your goals successfully. This step requires determining the strategies necessary to attain your objectives and designating a timeline and clearly communicating responsibilities.

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- Strategic choices usually involve a trade-off in opportunity cost. For example, your district may decide not to put as much funding behind technology upgrades, so that it can put more funding into teacher salaries.
- Be prepared to use your values, mission statement, and established priorities to say “no” to initiatives that won’t enhance your long-term strategic position.

Execute and manage the plan

- Once you have the plan, you’re ready to implement it.
 - First, communicate the plan to the community and district staff by sharing relevant documentation. Then, the actual work begins.
 - Turn your broader strategy into a concrete plan by mapping your processes. Use key performance indicator (KPI) dashboards to communicate team responsibilities clearly. This granular approach illustrates the completion process and ownership for each step of the way.
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Strategic Goal

State the Goal That Will Be Addressed

Rationale for Goal


Why is This Goal Important, Why is it Needed?

Action Plan (To Address Goal)	Strategies to Accomplish the Action Plan	Evaluation (KPI)	Completion Date	Responsible Party

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- Set up regular reviews with individual contributors and their managers and determine check-in points to ensure you're on track. Provide quarterly updates to the Board of Education and semi-annual reports to the community.

Review and revise the plan

- The final stage of the plan—to review and revise—gives you an opportunity to reevaluate your priorities and course-correct based on past successes or failures.
 - On a quarterly basis, determine which KPIs your team has met and how you can continue to meet them, adapting your plan as necessary. On an annual basis, it's important to reevaluate your priorities and strategic position to ensure that you stay on track for success in the long run.
 - Track your progress using balanced scorecards to comprehensively understand of your business's performance and execute strategic goals.
 - Over time you may find that your mission and vision need to change — an annual evaluation is a good time to consider those changes, prepare a new plan, and implement again.
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SCHOOL DISTRICT REPORTING TEMPLATE

Strategic Goal:

Strategic Action Plan:

Strategic Initiative:

Team Lead

Team Members

Budget Description

Budget:

Encumbered:

Activity:

Measure of Progress, Including baseline data (used for reporting):

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Periodic Report Commentary:	
Month:	
July 2022	
August 2022	
September 2022	
90 Day Plan	
October 2022	
November 2022	
December 2022	
90 Day Plan	

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Plan the Work - Work the Plan

- 1.If we don't know what done looks like, how will we recognize it when it arrives?
- 2.If we claim to be making progress, what are the units of measure of this progress (KPI's)?
- 3.Are these units of measure meaningful to the participants, especially the customer?
- 4.When there are changes, how will we know what the impacts are to the plan?

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Master the strategic planning process steps

- As you continue to implement the strategic planning process, repeating each step regularly, you will start to make measurable progress toward achieving your district's vision.
- Instead of constantly putting out fires, reacting to the state and federal requirements, or focusing on the latest hot-button initiative, you'll be able to maintain a long-term perspective and make decisions that will keep you on the path to success for years to come.

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Questions?

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THANK YOU!